User Manual

inxire ECM

Version 5.1

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1 Introduction

1.1 Objective of this Document

With inxire ECM, you now have an integrated software solution for Enterprise Content Management. Without any special technical expertise, you can quickly set up an intranet, extranet or internet portal.

This document answers the following questions:

- How are contents created, published and managed in inxire ECM?
- How does the editorial process work?
- How does the rights and role concept work?
- How can special functionalities such as forums, wikis and topic trees be used?

1.2 Target Group

The user manual is intended primarily for editors, authors and local group administrators who create and manage the contents in the system. It also provides the system administrator with important information on configuration when using the integrated user interface.

1.3 General Notes

The user interface of inxire ECM is multilingual – the standard languages are German and English.

Caution: The designations used here can differ from the actual terms on the interface, especially if customer-specific adaptations have been made!

2 First Steps in inxire ECM

2.1 Presentation of the System

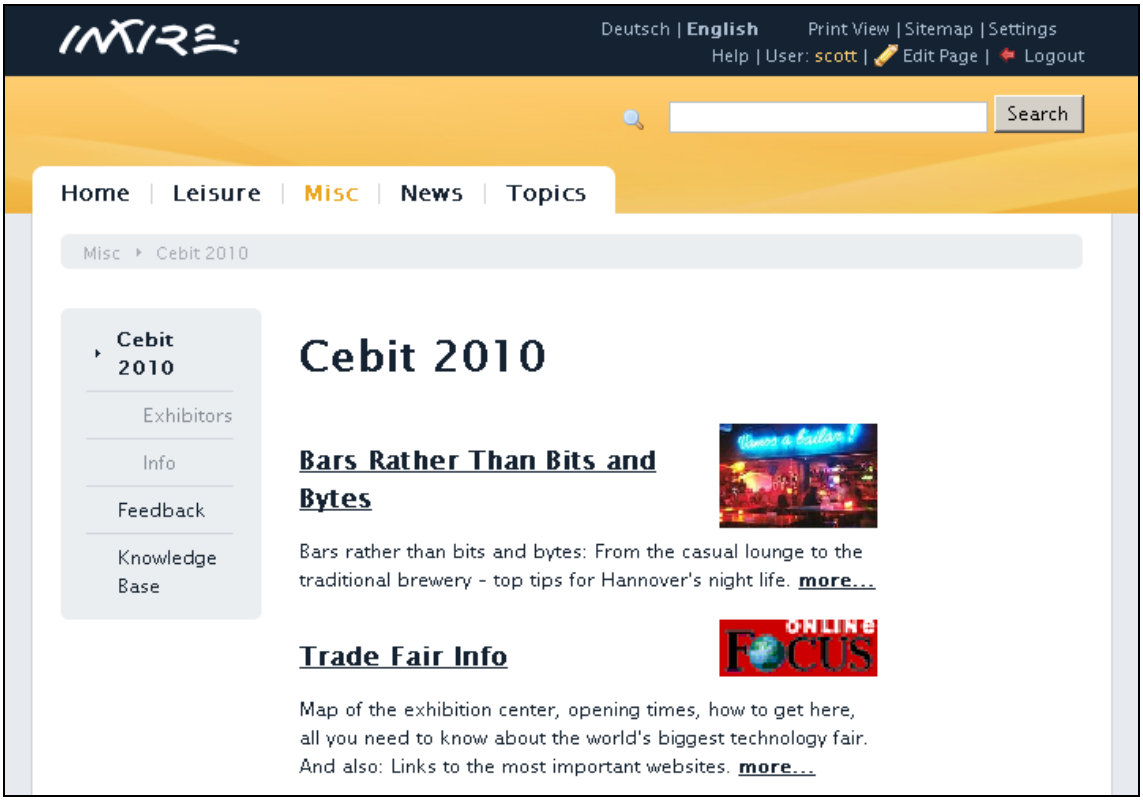

Deutsch | English
Print View | Sitemap | Settings
Help | User: scott | Edit Page | Logout
Search
Home | Leisure | Misc | News | Topics
Misc ▸ Cebit 2010
Cebit 2010
Exhibitors
Info
Feedback
Knowledge Base
Cebit 2010
Bars Rather Than Bits and Bytes
Bars rather than bits and bytes: From the casual lounge to the traditional brewery - top tips for Hannover's night life. more...
Trade Fair Info
Map of the exhibition center, opening times, how to get here, all you need to know about the world's biggest technology fair. And also: Links to the most important websites. more...

Figure 1: Typical Website in the Portal (Example)

The figure above shows a typical portal page with two articles in abridged format. In the page frame you can see various navigation elements and useful functions.

The page layout of your portal can differ from that in the figure above as the appearance is frequently customized and, in some cases, additional functionality has been implemented. However, the following basic functionality should always be present:

- The horizontal main navigation with the categories above the content
- A vertical navigation menu on the left to navigate within the categories
- A navigation path below the main navigation (or above it). This shows your current position and provides orientation.
- Supplementary information on the right of the screen such as downloads, links to related topics, etc. (this area is empty in the figure).

Besides the navigation elements, other useful aids are available (usually at the top of the screen):

- Change the language? Just click on the preferred language.
- The link `Print View` opens a preview of the printout. But you usually won't need this – the pages are automatically optimized for printing. Try it out!
- In the `Sitemap` you can find an overview of all categories and subsections.
- Under `Settings` you can change your password and edit your subscriptions (see Section 5.6.2).
- The link `Help` opens the online help. This is present on all pages of the portal. In addition, the more complex screens have context help: .
- And of importance for authors: The link `Edit Page`. This accesses the editorial view (see Section 2.4).

  Only logged in and authorized users can see this link.

The sections which follow introduce each of the different areas of the application. Alternatively, you can use one of the following links to look at a specific topic in detail.

Further Information:

- Section 5.1: Forum
- Section 5.3: Wiki
- Section 5.4: Document Share
- Section 5.5: Task Lists
- Section 5.6: News Channels and Subscriptions
- Chapter 9: Search

2.2 Logging In to the System

You can read the public contents of the portal without logging in. However, to gain access to protected information, you must first log in with your user name.

Logging in to the system is also necessary if you wish to edit the portal pages or if you wish to switch to the editorial area (editorial view, see Section 2.4).

You can access the login screen using the link `Login` on the top right of each page:

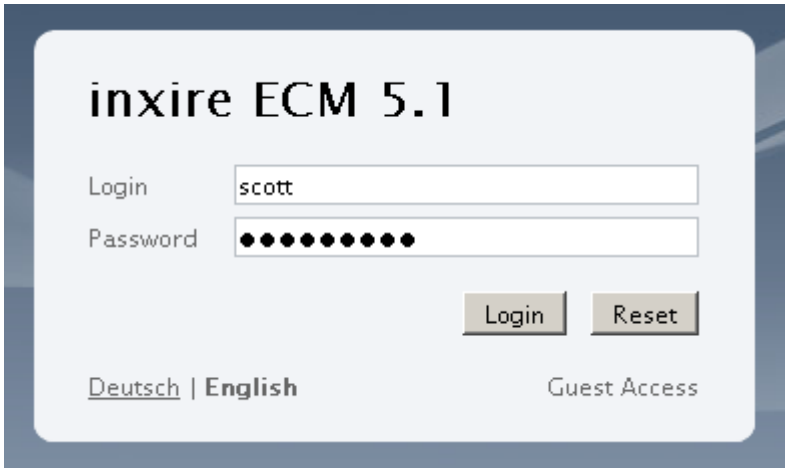


Figure 2: Login Screen of inxire ECM

Enter your user name and password and choose the button `Login`.

Alternatively, you can choose not to log in and use the link `Guest Access` to view the public pages in the portal.

Note: You can change the language using the functions at the bottom.

2.3 Modules and Active Elements

In addition to static information offerings, the portal also contains active elements. These elements can appear anywhere in the portal.

- Online Forums

  Each forum consists of any number of threads which can be displayed in chronological order and can be searched (see Section 5.1).

- Wikis

  A wiki organizes articles according to headwords, similar to a dictionary. The articles are maintained directly in the portal by a team of authors (see Section 5.3)

- Document Shares

  Document shares enable project teams and work groups to maintain a common set of documents (see Section 5.4).

- Task Lists

  Teams often need a way of tracking tasks that are assigned to the members. A task list is ideal for this purpose (see Section 5.5).

- Topic Trees

  In a topic tree, the terms (topics) are arranged hierarchically. You can navigate to the topics and display related articles (see Section 5.7).

- News Channels

  Users can subscribe to news channels to be informed by e-mail about new or changed content. A news channel covers a specific area of the portal, for example, the news area or a forum (see Section 5.6).

- Surveys

  You can publish online surveys in the portal. The replies are saved anonymously in a database and evaluated statistically (see Section 5.2).

Note: Most of this functionality has to be set up by the system administrator. An ordinary user can only create a survey or create a topic in the topic tree (if the user has the appropriate authorizations).

Note: Not all of the functionality described here is available in every installation.

2.4 Editorial View

The portal pages are maintained in the editorial view. This is a separate application to which only logged-in and authorized users have access.

You access the editorial view using the link `Edit Page` at the top of each portal page (except in forums, wikis and other special areas). To return to the portal, choose `Portal View`.

The editorial view provides a glimpse behind-the-scenes:

- Images are stored separately from the articles, for example, in an image database or in a hidden folder.
- Articles can exist in multiple language versions – or just one article for all languages.
- Each change made to a page in the portal undergoes a multi-step approval process (depending on the configuration).
- There are temporary work spaces for editors and reviewers and private areas for each user.
- An access control regulates the visibility of each article and each category in the portal.

Only the editorial view provides you with a good overview of all this information.

Besides editorial maintenance of the portal pages, the editorial view is also used for administrative tasks, such as the administration of user groups (see Chapter 6) and the configuration of online forums, wikis and other special functionalities (see Chapter 5).

2.4.1 Page Structure

The following figure shows the editorial view immediately after it has been called using the link `Edit Page` (see Figure 1):

Figure 3: Accessing the Editorial View (Example)

The portal page is embedded on the right of the screen and provides additional editing functions such as `New`.... A click on the `List` or `Symbols` tab displays the contents of the current directory in list or symbol form (see Section 3.2.3).

On the left of the figure you can see the folder hierarchy. All folders under `Web Pages` form the categories and subsections of the portal (the names in the portal can vary, see Section 4.1.4.2).

For the exact rules according to which the portal pages are formed from the folder contents, see Chapter 4 "Web Content Management".

2.4.1.1 Main Navigation

The main navigation is positioned horizontally at the top of the page. It allows quick switching between the different areas of the editorial view. Here you can find:

- the `Home` page with useful links to frequently used screens
- the `Work List` for pending work in the workflow management system (see Section 8.3)

- the `Folders` with all the contents of the portal view as well as the editorial and personal data (see Chapter 3)
- the `Admin`istration area with group administration, the list of broken links, and additional functions for system administrators
- and also the `Wastebasket` with all deleted documents and folders

Below the main navigation menu, the navigation path with your current position is displayed. You can navigate backwards to higher-level areas using this path.

2.4.1.2 Useful Functions

In addition to the above, various useful functions support your work:

- Search

  The entry field for the editorial search is at the top right of the page. This provides a full-text search across all the contents of the Folders. Extended search options are also available (see Section 9.4).

- Beginner/Expert

  At the top of the page you can find the functions `Beginner` and `Expert`. In beginner mode, information relating to access privileges and work groups is hidden in order to keep the screens as simple as possible.

- Change Language

  You can change the language manually using the functions at the top of the page. In contrast to the behavior in the portal, this has no effect on the visibility of articles and folders. Only the dialog texts change.

- Help

  The link `Help` at the top of the page opens the online help. Using the symbol at the top right, you can access a context help page that corresponds to the current screen.

Further Information:

- Chapter 3: The Folders
- Chapter 4: Web Content Management
- Chapter 5: Modules and Active Elements
- Chapter 6: Group Administration
- Chapter 8: Workflow Management
- Section 9.4: Editorial Search

2.4.2 Menus, Windows and Dynamic Trees

The pages of the editorial view feature various dynamic elements which are described briefly here.

2.4.2.1 Menu Bar

On many screens there is a menu bar above the lists and directories. This contains important editing functions. Just click on a menu to open it.

The following figure shows the Tools menu:

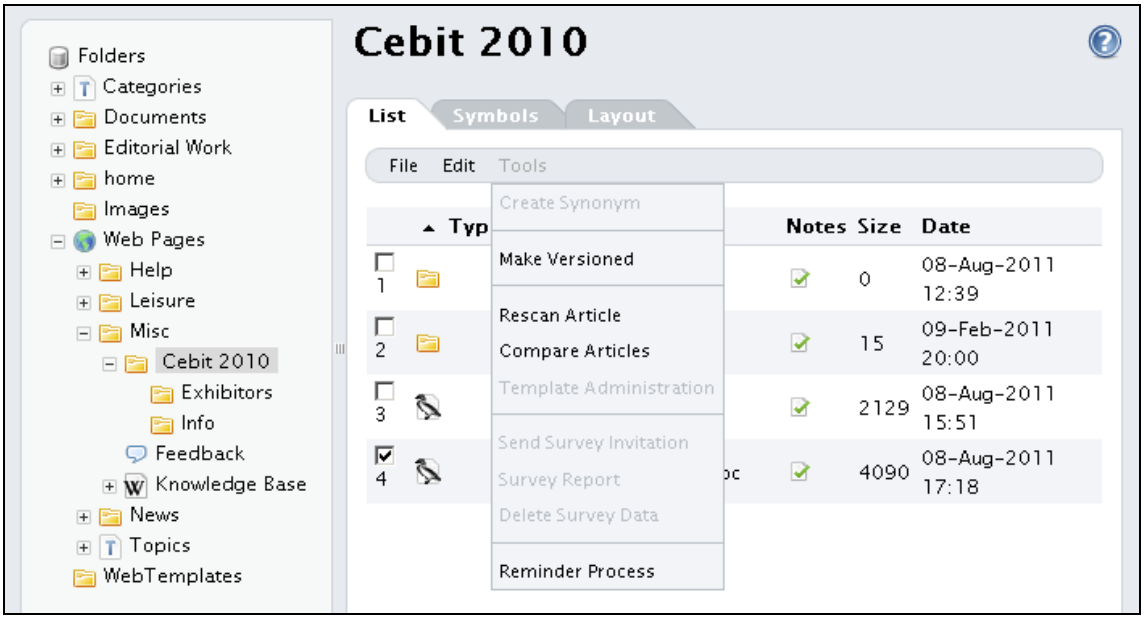


Figure 4: Tools Menu in the Folders

Only active functions, that is, functions that you can execute, are selectable here. Some functions require you to first select one or more entries from the list with a check mark. Many functions require special privileges, for example, write privileges in the current folder.

The menus of the editorial view are described individually in Appendix 10.3.

2.4.2.2 Context Menu

On all screens where there is a menu bar, you can also use the context menu. You open this by pressing the right mouse key over one of the following targets (under Windows, other operating systems may differ):

- Over the name of a list entry; appropriate editing functions are provided. The entry is selected automatically.
- Over a check box; you can select all or none of the entries.
- In the table background you can use the context menu to call general page functions, for example, to create a subfolder.

The following figures illustrate these options.

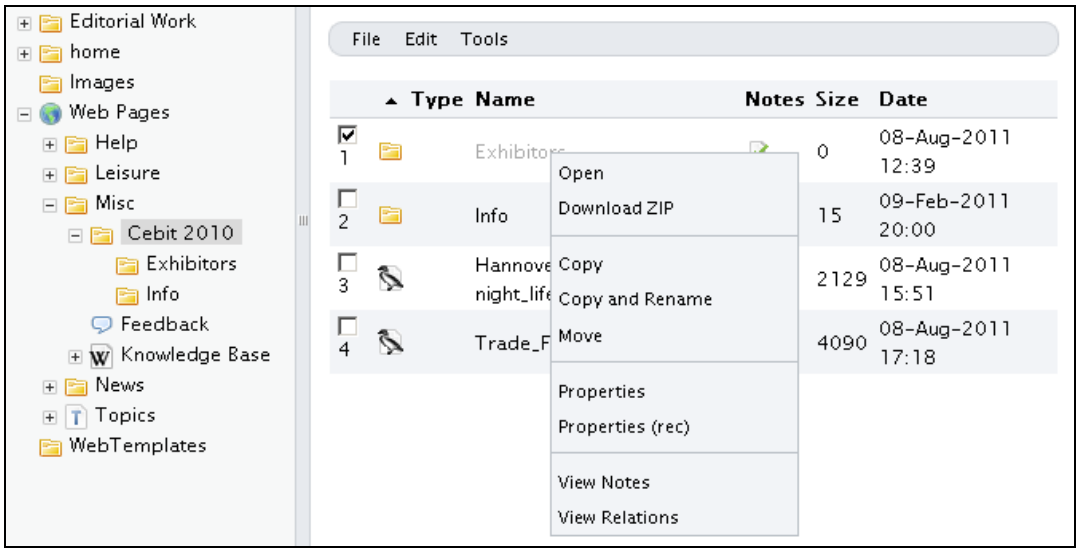


Figure 5: Context Menu Over the Name of a List Entry

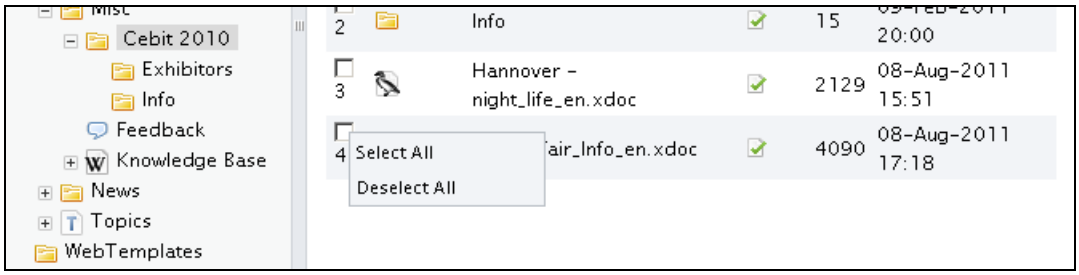


Figure 6: Context Menu Over a Check Box

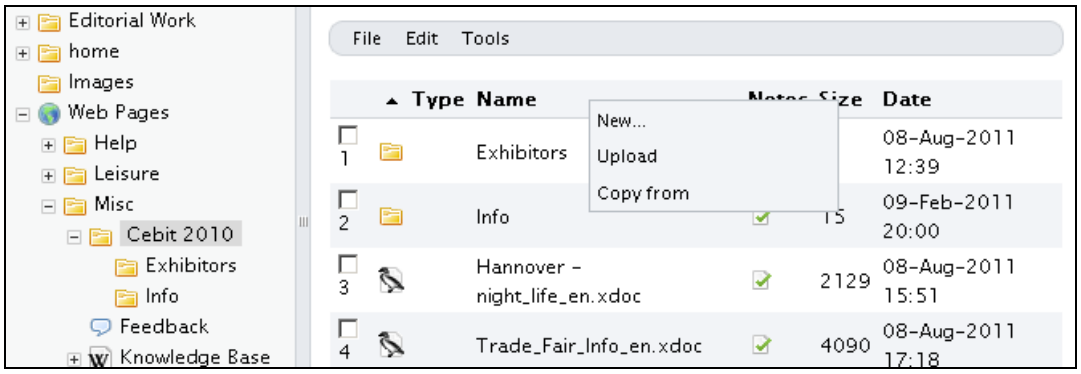


Figure 7: Context Menu Over the Table Background

2.4.2.3 Drag & Drop

Drag & drop functionality is available for fast copying or moving of items. You can simply drag list entries with the mouse to a different directory.

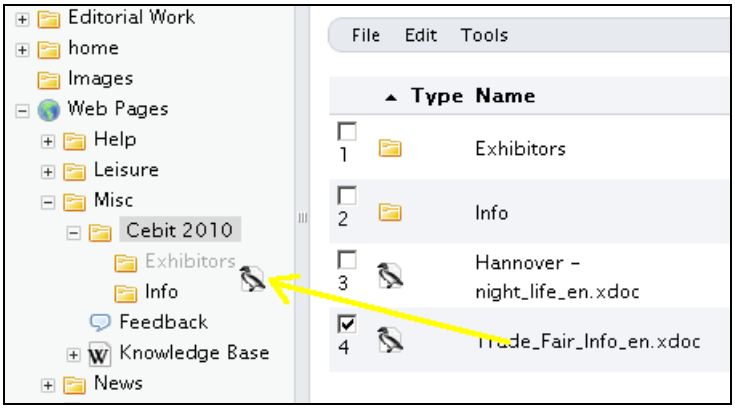


Figure 8: Moving or Copying with Drag & Drop

You can find a detailed description in Section 3.5.8.

2.4.2.4 Folder and Group Trees

The hierarchy of folders or groups is often represented as a dynamic tree structure (see Figure 3, left side). Even if you can only see a few entries at first, you always have access to the entire hierarchy.

- Click on a plus sign to display the list of subfolders or subgroups.
- Click again to close the list.

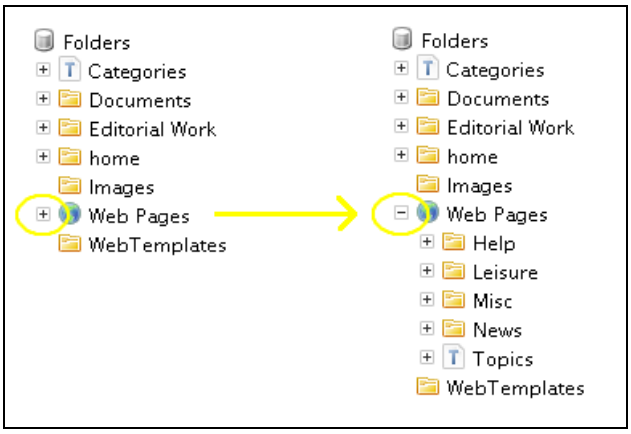


Figure 9: Opening Folders by Clicking on the Plus Sign

After you have found the folder (or group) you need, you select it by clicking on the name.

2.4.2.5 Flexible Windows

Some screens are split horizontally or vertically into separate areas. You can change the size of these areas by clicking on a border with the mouse pointer and keeping it pressed while dragging it to a new position.

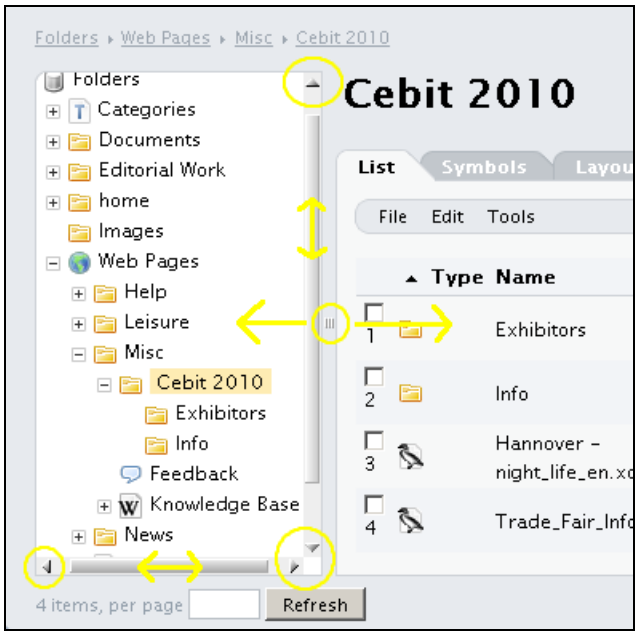


Figure 10: Flexible Windows

In the figure you can see that scroll bars appear if required. You can control these with the arrow keys, the page up and page down keys or the mouse.

Try it out!

3 The Folders

3.1 Introduction

The Folders are inxire ECM's content repository with all saved information. If you switch from the portal to the editorial view using the link `Edit Page`, this content repository opens automatically. Within the editorial view you can access the Folders at any time by way of the main navigation (see Section 2.4).

The structure resembles a classic file system as is familiar from modern computer systems. Files – hereafter called documents – can exist in numerous formats, for example, as PDF documents or JPEG images. Folders enable you to store documents in any number of hierarchy levels.

In addition to documents and folders, the content repository also contains special objects such as online forums or wikis. These are special portal functionalities and are described in detail in Section 3.1.3.

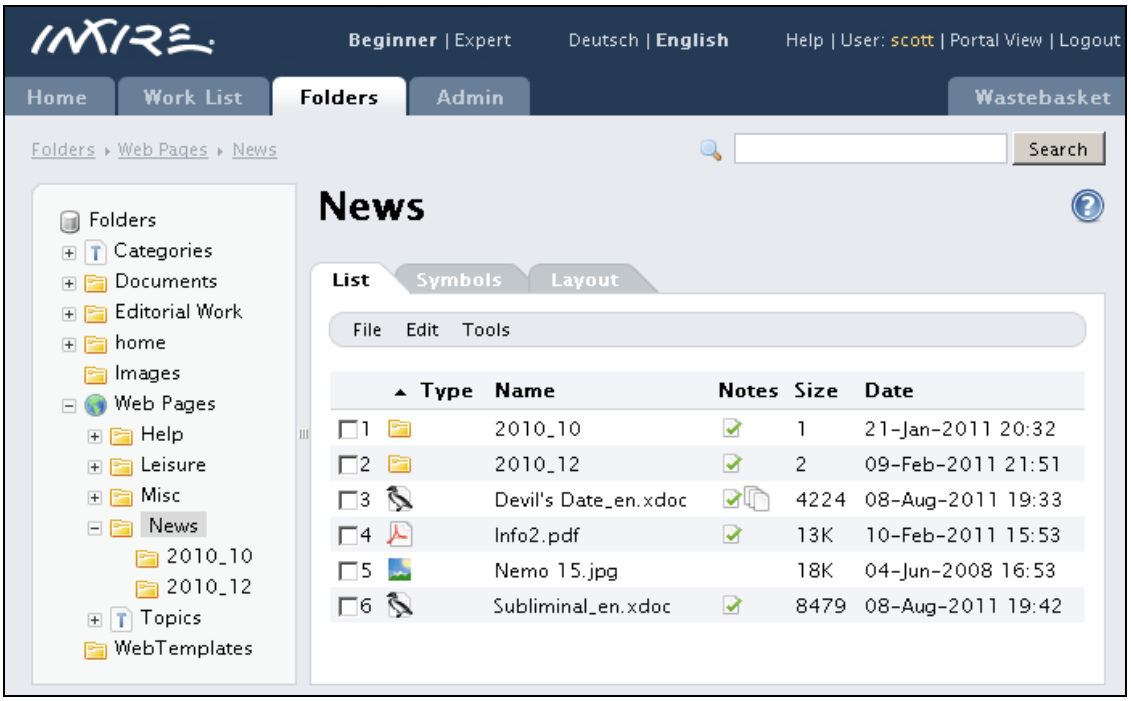


Figure 11: The Folders

3.1.1 What Can You Find Within the Folders?

Besides the contents of the portal, the Folders also contain personal and editorial work spaces. Below is a brief introduction to the most important main folders (the names can vary):

- `Web Pages`

  The `Web Pages` folder contains all the portal content. If the folder has been given a different name, you can recognize it by the icon with the blue globe . For more information, see Chapter 4 "Web Content Management".

- `Editorial Work`

  The folder `Editorial Work` is where all the editorial work takes place. All the temporary data that is required for revision of portal pages is stored here. Completed processes are archived in the subfolder `Archive` (see Chapter 8 "Workflow Management").

- `WebTemplates`

  The templates for Web articles are stored here (see Section 4.1.2). These are usually set up on initial configuration of the system.

- `Images`

  This area contains the central image database with graphic material for Web articles. Besides images, you can also find videos and animations.

- `home`

  The folder `home` is the access point to the private folders of all users. Each user is assigned a subfolder with user ID. As a rule, you can only see your own folders and possibly those of the guest user.

- `Categories`

  This is not a folder but a topic tree as can be recognized by the icon (see Section 5.7). In the topic tree, the terms (called topics or categories) are arranged hierarchically. These are used to categorize documents and folders for metadata maintenance (see Section 3.3.6). In the `Topic Search` (see Section 3.2.3.2) you can display the associated documents.

Additional main folders may exist, for example, a `Documents` folder for storage of guidelines and other editorial resources.

3.1.2 Access Control

Not all users can edit, or even see, all the contents of the Folders. A sophisticated access control system regulates access to each individual entry. This can mean, for example, that you are allowed to read a document but not to change it. If you do not have write privileges, especially for portal contents, an approval process can help (see Section 8.5).

You can find a detailed description of the access control system in Chapter 7.

3.1.3 Special Objects

In addition to files and folders, the content repository also contains special objects which have unique functionality in the portal:

- Task List

  Especially with document shares, task lists can be set up (see Section 5.5).

- Online Forum

  A forum appears at this point in the portal (see Section 5.1).

- Document Share

  A project team can store shared documents here without having to leave the portal view (see Section 5.4).

- Stored Queries

  You can save search queries in the editorial view. These are stored in your private folders and can be opened again by clicking on them (see Section 9.4.2.4).

- Topic / Category Tree

  A topic tree contains hierarchically arranged terms for categorization of documents and folders (see Section 5.7). Users can navigate in the topic tree and display assigned contents. Topic trees can be used both in the portal view and the editorial view.

- Survey

  You can publish online surveys in the portal. Surveys are created with the survey editor (see Section 5.2).

- Website

  There is usually only one website object within the Folders and this is called `Web Pages`. This indicates the start of the portal area (see above).

- Wiki

  A wiki object contains the articles of a wiki in a special folder structure. These articles are organized by headwords, similar to a dictionary (see Section 5.3). They are maintained directly in the portal. You should not make any changes in the editorial view.

Most of these special objects have to be set up by the system administrator (see Chapter 5 "Modules and Active Elements"). An ordinary user can only create a stored query, a survey, or a topic in the topic tree.

Note: Not all of the functionality described here is available in every installation.

3.1.4 Versioned Documents

Each document can be changed into a versioned document. The advantage here is that older versions are not overwritten but are saved internally.

You can recognize versioned documents by the additional icon (see Figure 11, column `Notes`). By clicking on this icon, you open an overview of all previous versions (see Section 3.5.6).

To prevent inadvertent overwriting, you must reserve versioned documents before editing them (menu `Edit > Reserve`). Do not forget to release the documents afterwards (menu `Edit > Apply Changes`).

3.1.5 Working From Your PC

You can also work directly with the file system of the content repository from your own PC if this has been enabled. Protocols such as FTP, SMB (Windows) and WebDAV are available for this purpose. Consult your system administrator.

3.2 File Manager

The file manager is the principal tool in the Folders. Using this, you can view the contents of each folder and – with the appropriate privileges – edit them. A navigation tree helps you to switch quickly between the folders.

The file manager opens automatically if you click on `Folders` in the main menu of the editorial view.

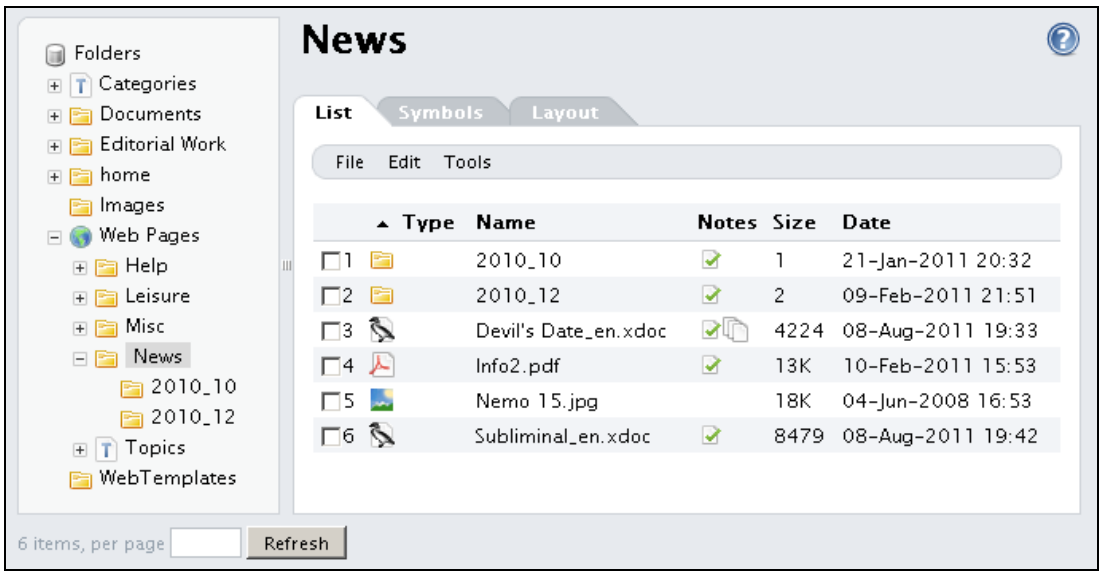


Figure 12: List View in the File Manager

3.2.1 Overview

On the left of the figure, you can see the navigation tree with the folder hierarchy. On the right, the contents of the current folder are displayed. Above this is the name of the folder (here: `News`).

A folder can contain documents, subfolders and special objects (see Section 3.1.3). You can choose between different views: A detailed list, graphical symbols or the layout preview for the portal. Just click on the appropriate tab.

Authorized users can make use of the numerous editing functions (see Section 3.2.4).

3.2.2 Navigation Tree

The navigation tree contains all the folders in the content repository. The tree mirrors the hierarchical structure. Under each folder are listed its subfolders, the subfolders of these subfolders, etc.

To navigate to a folder, click on its name.

Can't find a folder? No problem. You can open and close each folder by clicking on the plus or minus signs (see Section 2.4.2.4).

3.2.3 Views

On the right, the contents of the current folder are displayed. As standard, there are three views to choose from. Switch between them by clicking on the tabs:

- `List`

  The entries with their details are listed in a table (see Figure 12).

- `Symbols`

  Each entry is represented by an icon. Images appear as thumbnails. Under these is the name of the entry.

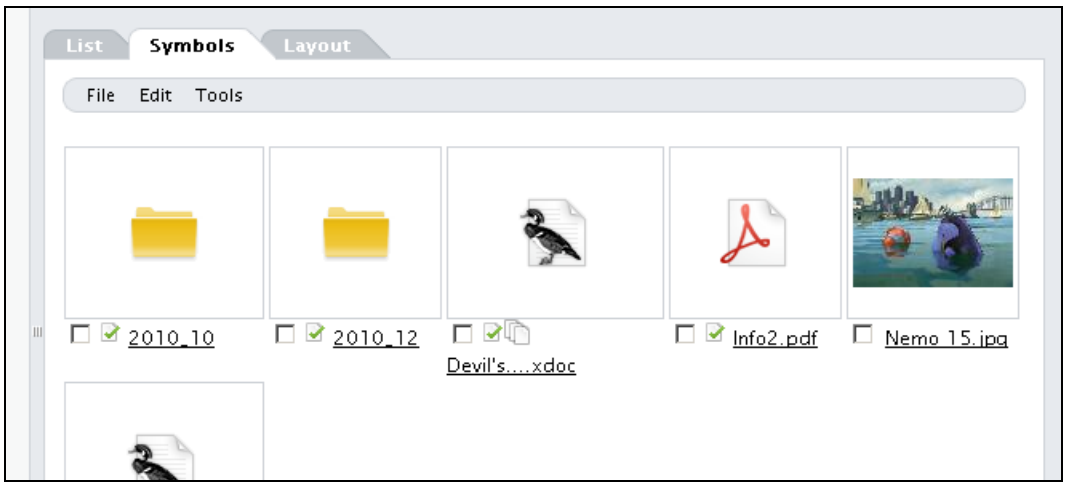


Figure 13: Symbols View in the File Manager

- `Layout`

  This is a layout preview for the portal which displays all published folder contents.

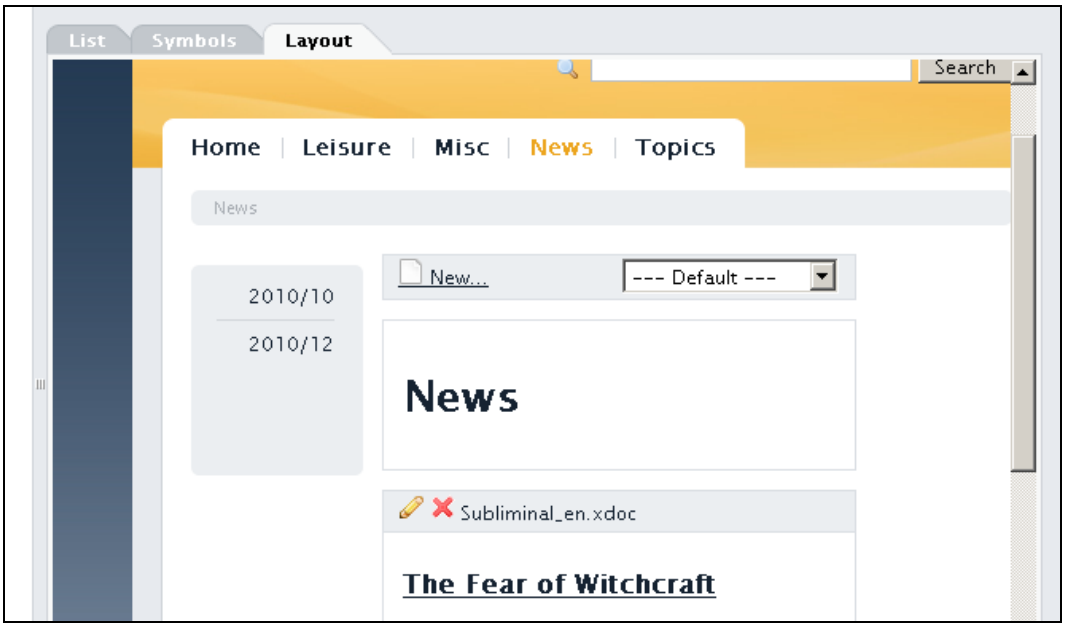


Figure 14: Layout Preview in the File Manager

Note: The link `Portal View` at the top of the page (not in the figure) opens the current folder in the portal. Try it!

Note: You can find the display rules for portal pages in Chapter 4 "Web Content Management". Information on publication is contained in Section 4.1.4.

In the list and symbols view, you can click on the name of the entry to open it. Folders open directly in the file manager, Web articles open in the article editor (see Section 4.3) and other types of documents such as PDFs are offered for download.

Many icons contain a link to further information. The type symbol of a document opens a preview in a separate browser window (if the format permits this). Notes (column `Notes` in Figure 12) frequently lead to a detail view (see Section 3.4).

You can use the symbols view as an image gallery. Simply click on a thumbnail to open the image in single view (see Section 3.4.4). Buttons enable you to scroll through the images in the folder.

Note: Due to space limitations, the labels are not always written in full (see `Devil's...xdoc` in Figure 13). If you hold the mouse pointer over it, the complete text is displayed.

3.2.3.1 List View

The list view is structured as a table. By clicking on a column heading, you can sort the table as required. The current sort order is indicated by the arrow next to the column heading (column `Type` in Figure 12).

The meaning of the columns in the table:

Attribute	Description
Type	Shows the type of the directory entry in the form of an icon. The icons used are listed in Appendix 10.1.
Name	Name of the entry
Notes	Important notes (see Section 3.4) are shown here with icons, for example: • Versioned document (see Section 3.1.4). This is a link to the version history. • Published in the portal (see Section 4.1.4) • Indicator of a pending update in a process (see Section 3.2.5). There may be a link to the process. For a complete list of all icons, see Appendix 10.1.
Size	For folders: Number of directory entries For documents: Size in bytes
Date	Date of the last modification
Owner	The entry is currently assigned to this user. Note: This column is only visible in expert mode (see Section 2.4.1.2).
Group	Assigned work group; optional (see Section 7.1.1) Note: This column is only visible in expert mode (see Section 2.4.1.2).
ACL	Access control list (see Chapter 7); a (+) after the ACL indicates additional privileges for individual users or roles (see Section 3.5.17). Note: This column is only visible in expert mode (see Section 2.4.1.2).

Table 1: List View in the File Manager

3.2.3.2 Topic Search

Within a topic tree (see Section 5.7), a fourth tab is available, `Topic Search`. The contents of the current folder are not displayed here (in this case a topic / category) but rather, all documents that are linked to this topic.

These documents also appear in the portal – if they have been published.

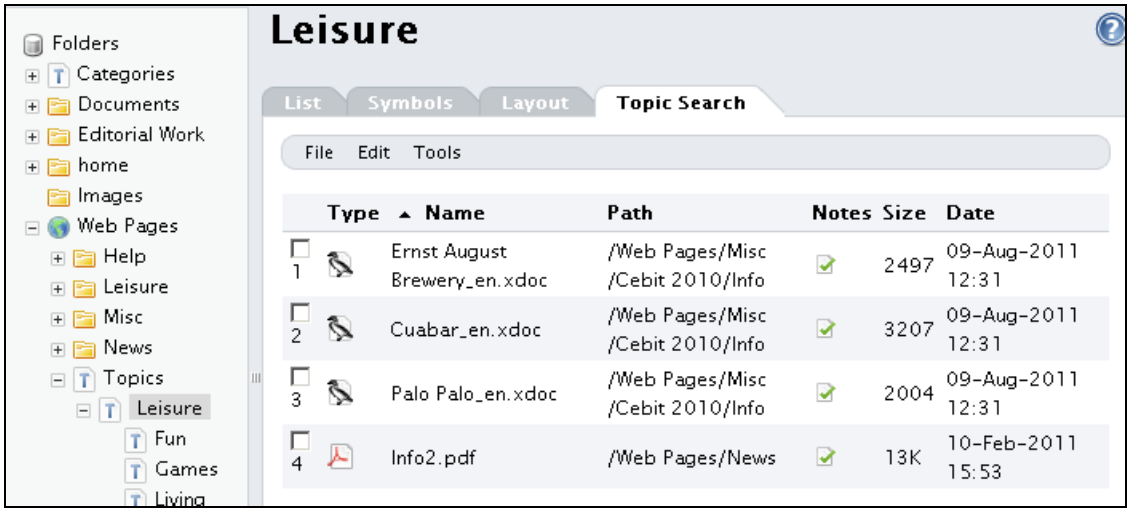


Figure 15: Topic Search

Note: In the case of articles, the link between a topic and a document is maintained in the article editor (`Keywords`, see Section 4.2.4) and in the case of other documents, it is maintained in the properties dialog (tab page `Metadata`, see Section 3.3.6).

3.2.4 Editing Functions

Depending on the view selected, different editing functions are available.

3.2.4.1 List and Symbols View

In the list and symbols view, there is a menu bar above the folder content (see Figure 13). Click on a menu to open it:

- `File`

  For file operations such as create, delete and copy,

- `Edit`

  For working with temporary process data (see Section 3.2.5), Web articles (see Section 4.1.2), etc.

- `Tools`

  For useful auxiliary functions.

For instructions on using the menu bar, see Section 2.4.2.1. For a detailed description of all menu options, see Appendix 10.3.

Alternatively, you can call many functions by way of the context menu (usually the right mouse key, see Section 2.4.2.2). Over the name of an entry, it contains appropriate functions for this entry. Over the table background it contains folder functions and over the check boxes, it contains auxiliary functions for selecting all entries.

Note: The menu options are only available if you have sufficient privileges.

3.2.4.2 Layout Preview

The layout preview does not provide menus so that even beginners can work quickly and intuitively. Instead, function icons are located at the individual articles and documents. Functions relating to the folder are provided at the top of the page:

- New...

  This function creates a new entry in the current directory. When you call the function, a dialog opens where you select the type: Folder, article, survey, etc.

  Note: The drop-down menu to the right determines the page template.

  Note: The new entries are published automatically (see Section 4.1.4).

- edit

  For Web articles (see Section 4.1.2), the article editor opens; for surveys, the survey editor opens (see Section 5.2.2) and for other documents, the upload dialog opens (Upload, see Section 3.5.2).

- remove

  The entry is moved to the wastebasket.

Note: If a publication process (see Section 8.5) has been configured, you can edit the entries even without authorization. In this case, a publication process is started – after confirmation – and you work with a copy of the data until approval is granted (see next section).

3.2.5 Working in a Process

During the course of a process (see Chapter 8), you very seldom work with original data, but usually with copies (see Section 8.2.3). These copies are stored in a temporary work folder or they are appended directly to the originals (revision mode).

In each case, you can see a link to the process to the right of the title in the file manager, for example, "View Process" (No. 1 in Figure 16). In most cases a task description is displayed (No. 2, see Section 8.2.4).

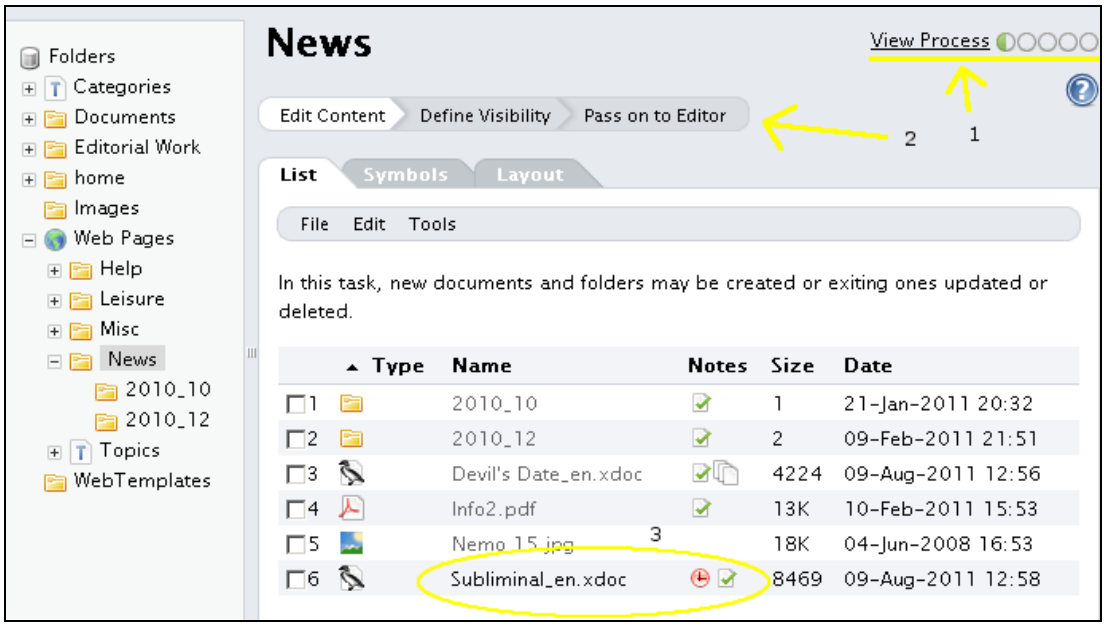


Figure 16: File Manager Within a Process (Revision Mode)

3.2.5.1 Temporary Work Folder

A temporary work folder is a normal folder in the editorial area (`/Editorial Work`, see Section 3.1.1).

You can use the file manager there as normal.

3.2.5.2 Revision Mode

You can recognize the revision mode by the grayed out entries in the list view (see Figure 16). You must reserve each entry before editing. A working copy is then created and appended to the original (No. 3 in Figure 16). You cannot change the originals.

Note: In the layout preview, entries are reserved for you automatically as soon as you click on an editing function. In the list or symbols view you use the menu option `Edit > Reserve` to reserve entries. Using the menu option `Edit > Cancel Reservation`, you can undo your changes.

Following reservation, the entries cannot be edited by other users or in another process. Conversely, you cannot edit entries that have already been reserved under another process.

Change indicators are displayed for your information. This means that you can see exactly which documents and folders you have changed or deleted (examples in Section 8.5.6). You can obtain more information as an info text if you position the mouse pointer over a change.

3.3 Properties Dialog

If you need more information than that available in the lists and directories of the editorial view, you can turn to the properties dialog. Here you can view all properties of documents, folders, users, work groups and other special objects (see Section 3.1.3).

Or maybe you wish to change settings? The properties dialog can help here also. You need it for renaming folders, for publication of articles, configuration of wikis and forums and for the maintenance of metadata.

Within the Folders, you can access the properties dialog using the menu options `File > Properties` or `File > Properties (rec)`. Within group administration (see Section 6.1), you can find it using the menu options `Group Admin > Properties` and `Group Admin > Search Group/User`.

3.3.1 Overview

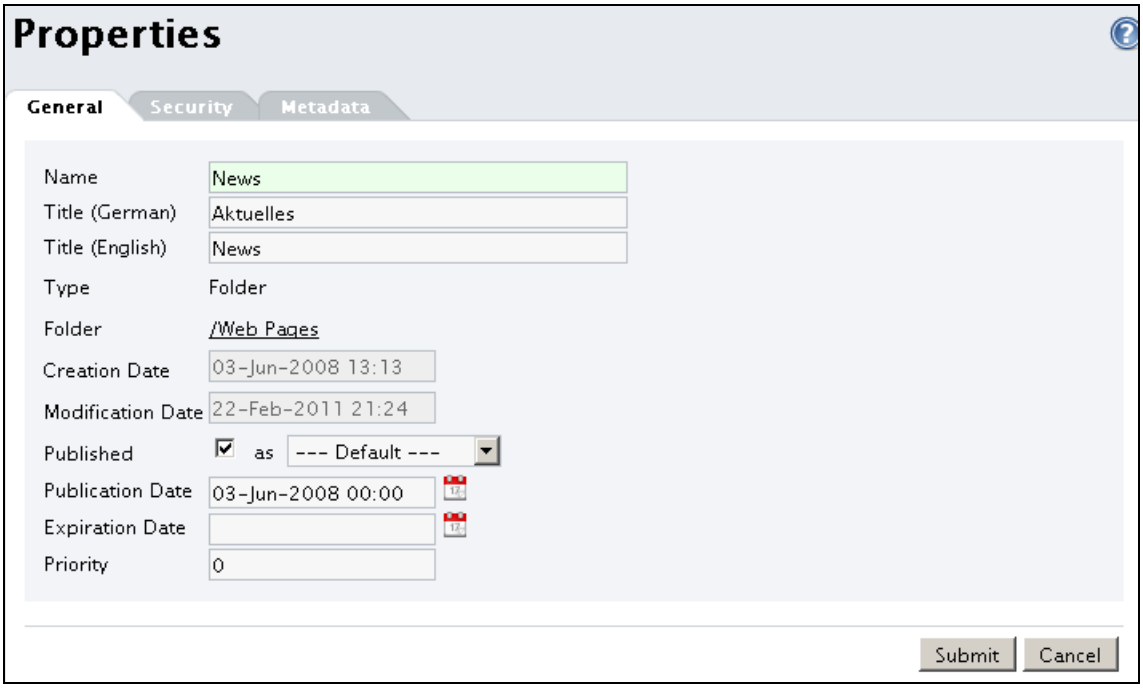


Figure 17: General Properties of a Folder

The properties dialog consists of multiple screens (tabs in the figure above):

- `General` screen

  Here you can find general settings such as name, title and publication period (see Section 3.3.3).

- One or two special screens (optional)

  Depending on the entry opened, one or two special screens are displayed, for documents, for example, the `Documents` screen (not in above figure). For an overview of all special screens, see Table 2 below.

- `Security` screen

  The settings for access control are stored here (see Section 3.3.5).

  Note: This screen is only visible in expert mode (see Section 2.4.1.2).

- `Metadata` screen

  The metadata screen displays the functional metadata such as keywords and description (see Section 3.3.6).

3.3.1.1 Navigating Between the Screens

Depending on the situation, different navigation elements are provided:

1. When you create new objects, you must go through the screens sequentially. Use the buttons `Next` and `Previous` to switch between screens.
2. Later, if you open the properties dialog again, tabs are displayed (see figure above). One click then takes you to the required screen.

3.3.1.2 Submit

To the bottom right of the page, you can find the button `Submit`. You must exit the dialog using this button in order to confirm your entries. Otherwise all changes will be lost.

Note: When you create new objects, the button `Submit` only becomes active after you have worked through all the screens.

3.3.1.3 Write Privileges

Not all users can change properties; you need write privileges for this (see Section 7.2.2).

If you do not have these, all entry fields are write-protected and in place of the button `Submit`, you have only the function `Back`.

3.3.1.4 Special Screens

The following table lists the special screens for documents and other objects such as wikis and forums:

Screen	Description
Document	Special properties of documents such as size, type and language (see Section 3.3.4).
Forum	Configuration of an online forum (see Section 5.1.3)

Screen	Description
Wiki	Configuration of a wiki (see Section 5.3.2)
Document Share	Configuration of a document share (see Section 5.4.3)
News Channel	Configuration of a news channel (Part I, see Section 5.6.3)
Details	Configuration of a news channel (Part II, see Section 5.6.3)

Table 2: Special Screens of the Properties Dialog

3.3.2 Multiple Objects?

You can also open the properties dialog for multiple objects. Just flag all the required entries before you call the dialog.

Only the properties that the entries have in common are displayed, this means that fields where the selected objects differ remain empty. Nevertheless, you can – with sufficient privileges – make changes in all fields. Only your changes will be applied later when you `Submit` the dialog.

On the `General` screen, an additional option appears, the `Recursive Update`. If you set a check mark here, the changes are not only applied to the selected objects but also to the contents of all folders and their subfolders (see menu function `File > Properties (rec)`, Section 3.5.14).

Note: Some entry fields and screens, for example, the field `Name` and the screen `Metadata`, are not available in this case.

3.3.3 Screen: General

The general settings (see Figure 17) include:

- the name as it is displayed in the editorial view,
- the title for the portal view (one for each language)
- information on the type (folder, work group, PDF document, etc.),
- further information such as storage location in the Folders, creation date and date of the last modification,

- the settings for publication in the portal: page template, period and priority (see Section 4.1.4),
- and the check box `Recursive Update` if applicable.

The fields in detail:

Attribute	Description	Possible Action
Name	File or folder name; only visible in the editorial view	Edit
Title (German)	Name in the portal for German-speaking users (See Section 4.1.4.2)	Set, edit, remove
Title (English)	Name in the portal for English-speaking users	Set, edit, remove
...	Title in other languages, if applicable	
Type	Type of the displayed object	None
Directory	Storage location in the Folders Caution: there are possibly multiple storage folders!	Navigate to the storage location (exits the properties dialog!)
...	Possibly further informative fields such as the related process of a working copy (see Section 3.2.5) or the position of a work group in the group hierarchy (see Section 6.4.10).	
Creation Date	Date on which the object was uploaded or generated.	None
Modification Date	Date of the last change	None
Published	Check box; indicates that a publication date has been set. If you flag a previously unchecked box, the current date is automatically set as the publication date.	Set or remove the check mark

Attribute	Description	Possible Action
as ...	Page template in the portal As a rule, you can leave `Default`.	Edit
Publication Date	Start of the publication period Without a publication date, the object is not visible in the portal.	Set, edit, remove
Expiration Date	End of the publication period If nothing is specified, the object is published indefinitely. Caution: As a rule, an object is automatically moved to the wastebasket 30 days after the expiration date[1].	Set, edit, remove
Priority	Controls the sequence in the portal: Entries with a priority appear first, smaller values before greater. Note: Use as few priority levels as possible, for example, 1, 2 and 3. Entries with the same priority or no priority are automatically sorted alphabetically[2].	Set, edit, remove
Recursive Update	Optional check box; only if multiple objects are edited or `File > Properties (rec)` is called. If this field is selected when you submit the dialog, your changes are not only made to the opened object (or objects) but also to the contents of all folders and subfolders. Note: If you are not editing a folder, then the flag has no significance.	Set or remove the check mark

Table 3: General Properties

[1] Depending on configuration of the system. Consult your system administrator.
[2] The default sorting can differ in your installation. For example, it can be according to publication date.

3.3.4 Screen: Document

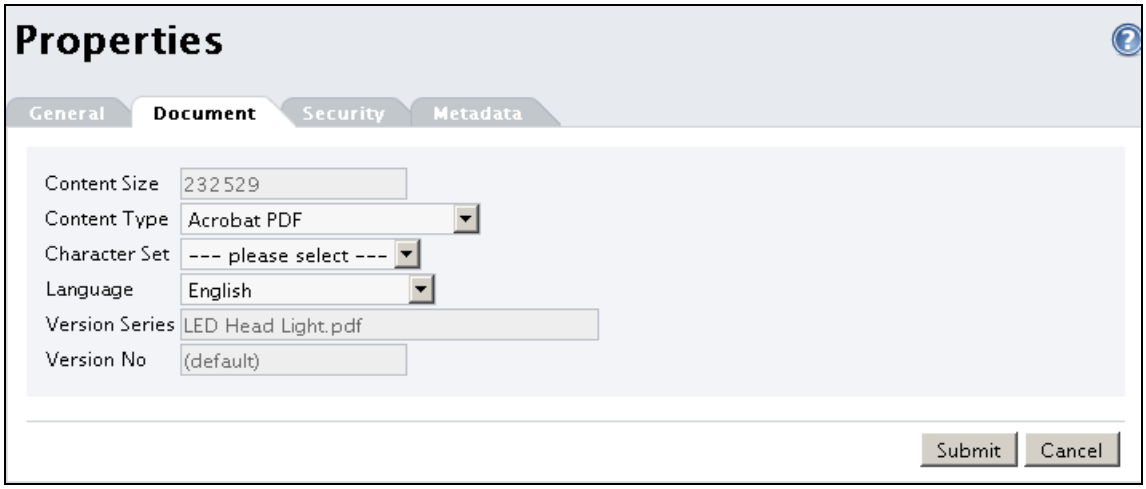


Figure 18: Properties of a Versioned Document

This screen is only displayed for documents.

In addition to purely informative details such as file size and version number (only for versioned documents, see Section 3.1.4), it also contains important configuration settings:

Attribute	Description	Possible Action
Size	Size of the content in bytes	None
Content Type	File type, for example, `Acrobat PDF`	Set, edit, remove[3]
Character Set	Character set used in the text (only for text formats)	Set, edit, remove
Language	Language of the content (important for full text indexing)	Set, edit, remove
Version Series	Name of the version series (only versioned documents, see Section 3.1.4) Usually identical to the file name.	None

[3] Usually the content type is set automatically. Only in exceptional cases do you need to make any corrections here.

Attribute	Description	Possible Action
Version No.	Numbering within the version series[4] The last valid version is given the add-on "`(default)`". (In Figure 18 the working copy of a reserved document is displayed; it does not yet have a version number.)	None

Table 4: Properties of a Document

3.3.5 Screen: Security

The `Security` screen is only visible in expert mode (see Section 2.4.1.2). It contains all properties that regulate access: Here, you maintain data such as the owner, the work group and the access control list.

For further explanation, see Chapter 7 "Access Control".

Below you can find some tips for working with the screen.

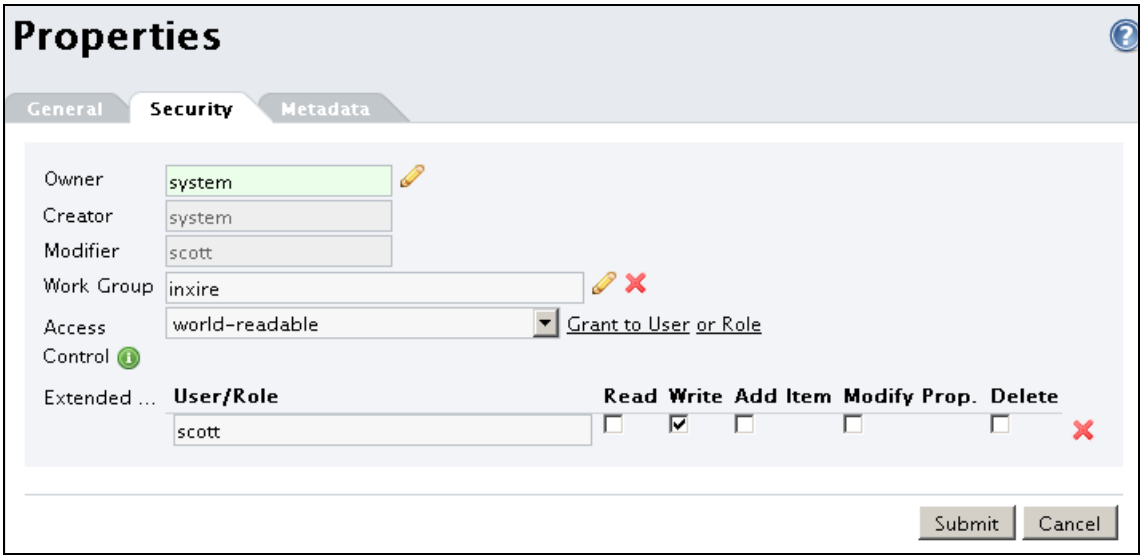


Figure 19: "Security" Screen in the Properties Dialog

3.3.5.1 Function Icons

You cannot edit the fields `Owner` and `Work Group` directly. Use the symbol (edit) to open a selection dialog.

You can remove an initial work group by clicking on the symbol (clear).

[4] The version number is incremented by one for each new version. However, the numbering is not necessarily consecutive since versions can also be removed.

3.3.5.2 Extended...

To assign extended access privileges, use one of the following functions (to the right of field `Access Control`):

- `Grant to User`
- `or Role`.

A selection dialog opens. Select the user or role (see Section 6.1.2) by clicking on a name. Automatically, a new line is shown in field `Extended...` (see Figure 19).

Now you can flag the required privileges with a check mark (see Section 7.2.2).

3.3.6 Screen: Metadata

The functional metadata is displayed on the `Metadata` screen. By maintaining the metadata, you improve the search in large datasets.

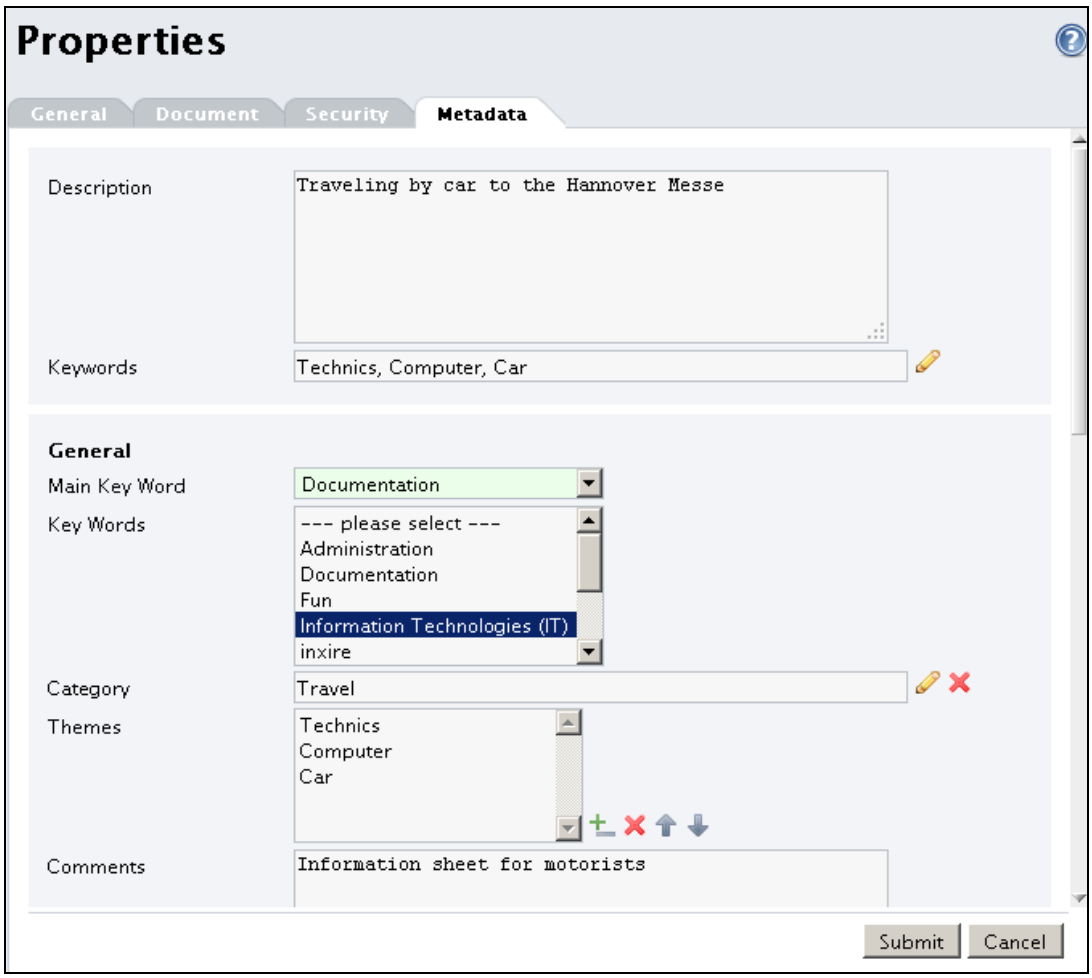


Figure 20: "Metadata" Screen in the Properties Dialog

On the top part of the screen you can see the standard meta-attributes:

- `Description`

  A short paragraph with a description.

- `Keywords`

  Text field for manual keywording. You can enter multiple words separated by a comma.

  In some cases, a topic tree is available for assistance. You will recognize this by the pencil symbol after the entry field. You open the topic tree by clicking on the pencil. In this case, you should only use keywords from the topic tree (see Section 3.2.3.2).

  Note: For Web articles (see Section 4.1.2), the field is write-protected because the keywords are not maintained here but rather in the article editor (see Section 4.3).

After the standard fields come the site-specific meta-attributes. These can be adapted flexibly to local requirements and are usually defined at installation; for this reason they cannot be described here.

If your configuration has not been adapted, you can see the inxire ECM sample metadata. For a description, see Appendix 10.4.

3.4 Notes

3.4.1 Introduction

Notes can be defined for every entry in the Folders whether they are documents, folders, or special objects. These notes contain either technical information, for example, the height and width of an image or they represent additional functionality, for example, a news channel (see Section 5.6.3).

In the lists of the editorial view, you can recognize the most important notes by their icons (column `Notes`, see Figure 16). In most cases you can find links to further information.

The table below summarizes all the notes used in inxire ECM.

Icon	Type (Abbreviation)	Description
	Link Infos (Links)	List of the hyperlinks and images in a Web article (see Section 3.4.3)
	Image metadata (Image-M)	The metadata of an image such as height, width, resolution, etc.; these are extracted from the image automatically (see Section 3.4.4)
	Video metadata (Video-M)	The metadata of an audio or video file; these are extracted automatically from the file (see Section 3.4.4)

Icon	Type (Abbreviation)	Description
	Synonym	A synonym for a topic in the topic tree (see Section 5.7.1.2)
	News channel (News-Ch)	Implements a news channel; this sends new contents per e-mail to the subscribers (see Section 5.6); especially at folders and online forums
	Sent-to-subscriber flag (Sent flag)	Indication that this document has been sent by a news channel (see Section 5.6); only documents
	Wastebasket entry (W-Basket)	Indicates that this object is in the wastebasket (see Section 3.5.10)
	Pending update (Update)	Indicator of a pending update (see Section 3.4.6)
	Working copy (Wrk. Copy)	Indicates the working copy of a pending update (see Section 3.4.6)
	Process	Implements a process in workflow management (see Section 3.4.5)
	Editorial working area (W-Area)	(no longer used in inxire ECM 5.1)
	Protected object (protected)	Protects a document or folder from process operations (see Chapter 8)
	Note	Internal note; has no significance for the user.

Table 5: Notes in inxire ECM

3.4.2 View Notes

On the `View Notes` screen, you can view all notes of a document, folder or special object (see Section 3.1.3). With the appropriate privileges, you can delete notes or change them in the properties dialog.

You access this screen using menu option `File > View Notes` (instructions in Section 3.5.18).

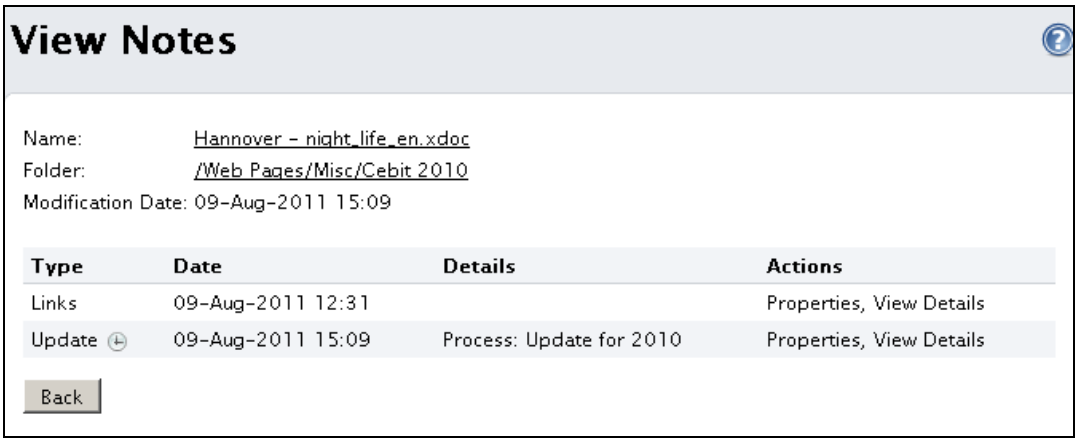


Figure 21: "View Notes" Screen

On the upper part of the screen you can see information on the opened document or folder, etc.:

- `Name`

  The file or folder name as it is displayed in the lists of the editorial view. The link opens the properties dialog (see Section 3.3).

- `Folder`

  Storage location in the Folders. The path contains a link which opens the storage folder in the file manager (see Section 3.2).

- `Modification Date`

  Date of the last change.

Note: In expert mode (see Section 2.4.1.2), `Owner`, `Work Group` and `Access Control` are also displayed.

On the lower part of the screen, the notes are displayed in table form.

The column `Type` describes the type of note, in some cases with an icon (see Table 5). In the column `Date`, you can see the date on which the last change was made to the note.

The column `Details` provides further information depending on the type. For example, you can see in Figure 21 the name of the process under which the update runs (last line).

In the column `Actions`, you can find one or more of the following functions (only those functions appear for which the user has authorization):

Action	Description
Properties	This function opens the note in the properties dialog (see Section 3.3).
Delete	The note is deleted – after confirmation. The related entry in the Folders remains intact. Caution: The action cannot be undone!
View Details	Opens a specialized detail view (if available). The following sections introduce the most important detail views.

Table 6: Actions That Can Be Applied to Notes

3.4.3 Detail View of Links

A note of type `Links` saves the hyperlinks and image references of a Web article (see Section 4.6). The related detail view lists this information in table form.

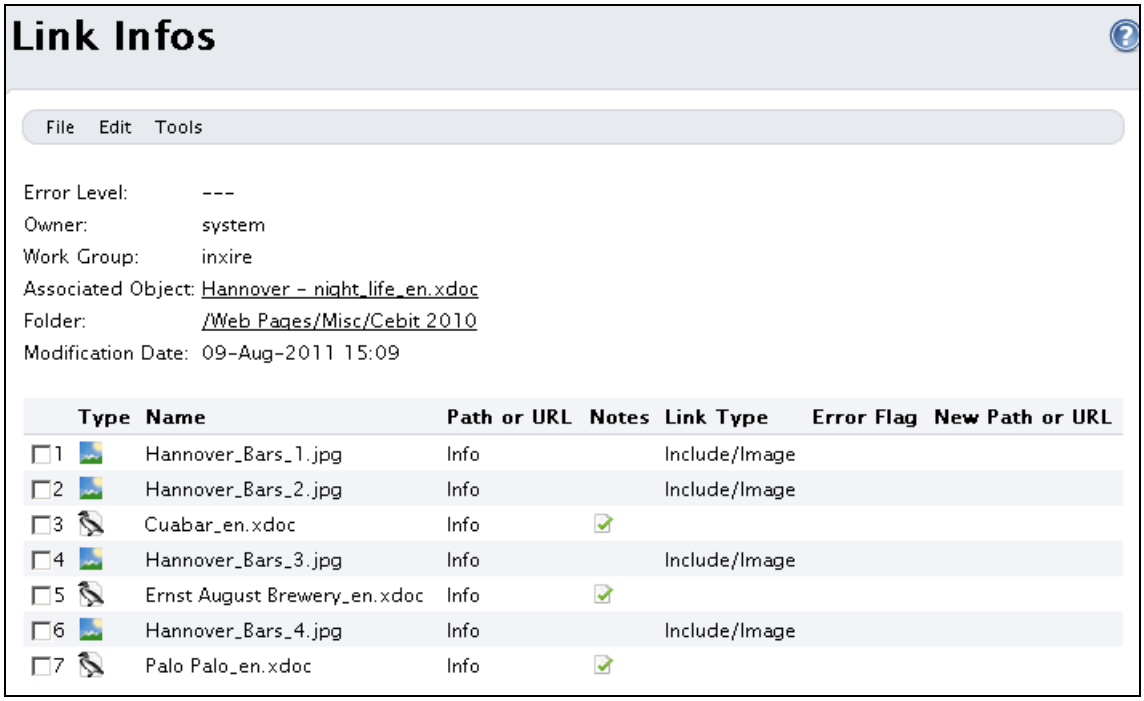

Link Infos
File Edit Tools
Error Level: ---
Owner: system
Work Group: inxire
Associated Object: Hannover - night_life_en.xdoc
Folder: /Web Pages/Misc/Cebit 2010
Modification Date: 09-Aug-2011 15:09
Type Name Path or URL Notes Link Type Error Flag New Path or URL
1 Hannover_Bars_1.jpg Info Include/Image
2 Hannover_Bars_2.jpg Info Include/Image
3 Cuabar_en.xdoc Info
4 Hannover_Bars_3.jpg Info Include/Image
5 Ernst August Brewery_en.xdoc Info
6 Hannover_Bars_4.jpg Info Include/Image
7 Palo Palo_en.xdoc Info

Figure 22: Detail View of the Links in an Article

The first columns (`Type`, `Name`, `Path or URL` and `Notes`) describe the target of the link. The `Link Type` shows if it is an embedded image or video object (`Include/Image`) or a hyperlink (empty). The remaining columns describe error situations.

This screen can be accessed not only from the list of notes but also from the list of broken links (see Section 4.6.1). There you can find a more detailed description (see Section 4.6.1.5).

3.4.4 Detail View for Image, Audio, and Video Metadata

For media information, the link `View Details` leads to the single image view. You can also access this view using the symbols view of the file manager (see Section 3.2.3):

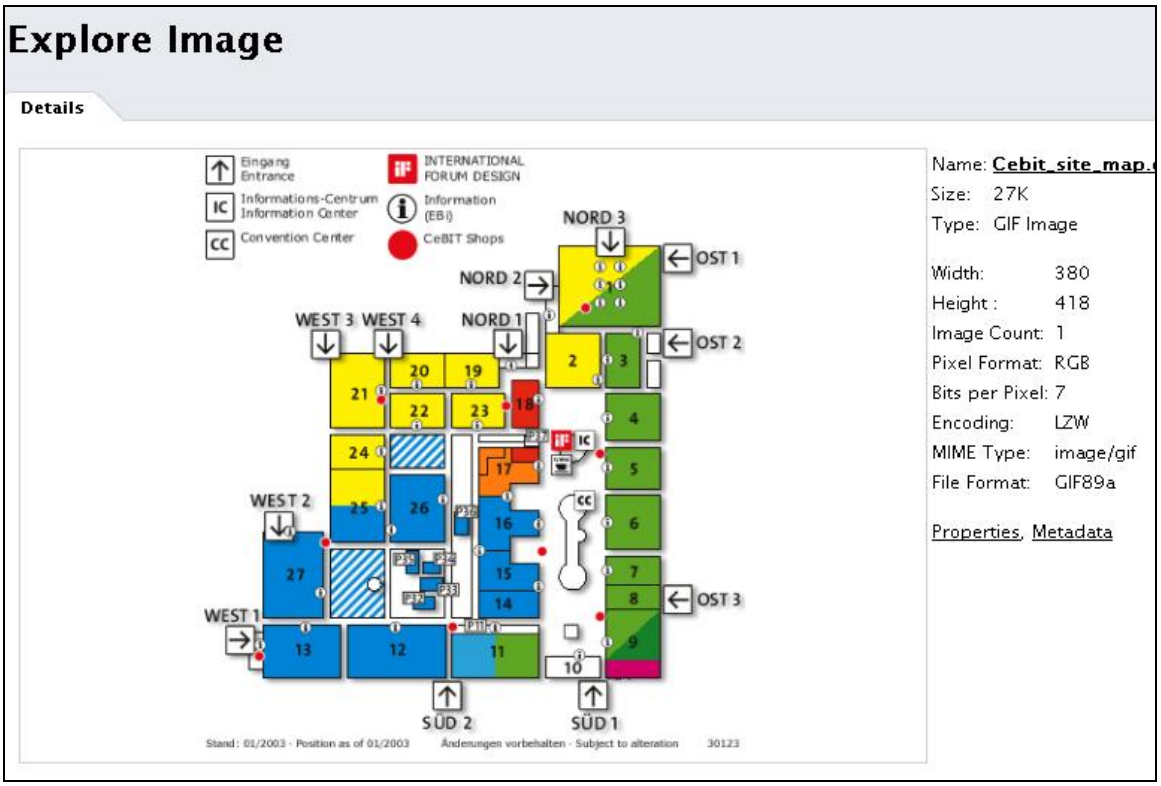


Figure 23: Single Image View

3.4.5 Detail View for Processes

The detail view of a process provides information on the type of the process, the current status, the edited contents and the history.

You can find a detailed description in Section 8.4.

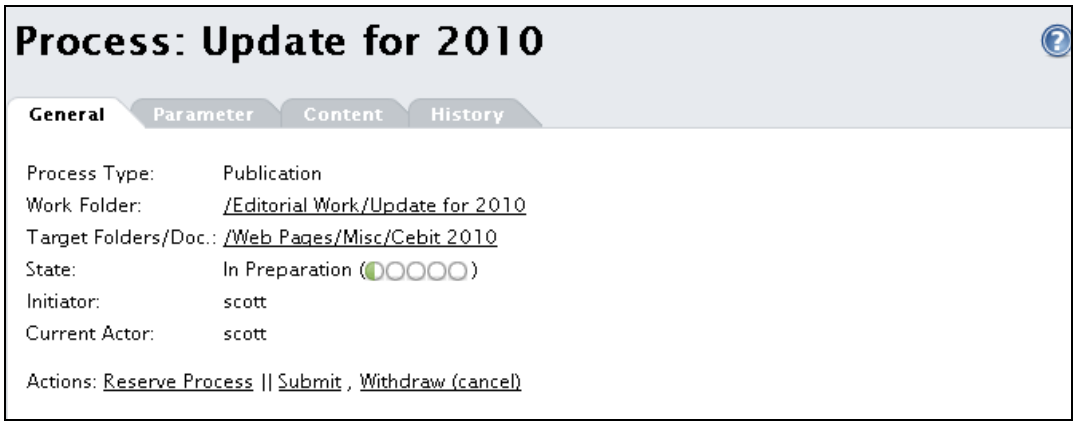


Figure 24: Detail View of a Process

3.4.6 Detail View of a Pending Update

A note of type `Update` indicates a current revision of the document or folder as part of a process. To provide a detail view, the file manager opens in revision mode (see Section 3.2.5.2).

There, change indicators show which entries have been edited or deleted. You can obtain more information as an info text if you position the mouse pointer over a change.

For an introduction to workflow management, see Chapter 8.

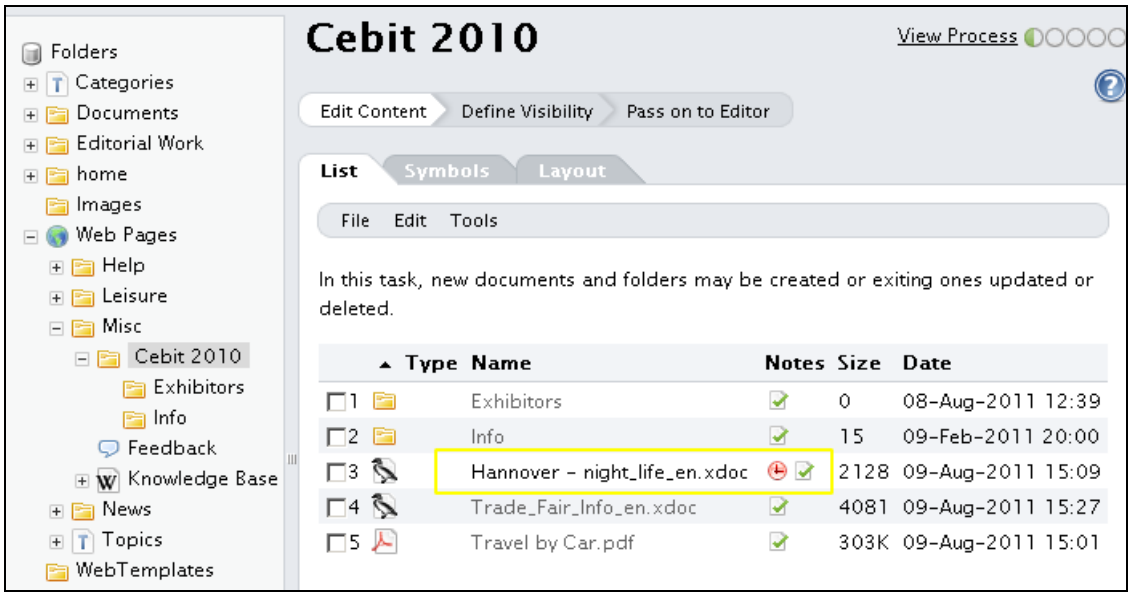


Figure 25: Detail View of a Pending Update

3.5 Typical Tasks

This section contains useful information for your daily work with folders, documents and the other objects in the content repository.

You can carry out most tasks quickly and intuitively using the menu bar (see Section 3.2.4); for all other tasks, the following sections provide assistance:

- Section 3.5.1: Creating a New Folder
- Section 3.5.2: Uploading Documents
- Section 3.5.3: Editing a Document on the PC
- Section 3.5.4: Converting a Document Into a Versioned Document
- Section 3.5.5: Editing a Versioned Document
- Section 3.5.6: Viewing the Version History
- Section 3.5.7: Copying or Moving
- Section 3.5.8: Copying or Moving with Drag & Drop
- Section 3.5.9: Creating a Copy in the Same Folder
- Section 3.5.10: Restoring Deleted Entries
- Section 3.5.11: Emptying the Wastebasket
- Section 3.5.12: Downloading a ZIP Archive
- Section 3.5.13: Uploading a ZIP Archive
- Section 3.5.14: Changing Properties Recursively
- Section 3.5.15: Renaming
- Section 3.5.16: Publishing
- Section 3.5.17: Setting Access Privileges
- Section 3.5.18: Displaying Notes
- Section 3.5.19: Viewing Relations

Only the system administrator can carry out the following activities:

- Section 3.5.20: Linking an Entry with a Second Folder
- Section 3.5.21: Adapting the Metadata Configuration
- Section 3.5.22: Releasing Locks

3.5.1 Creating a New Folder

Folders help you to clearly organize the contents of the content repository (Folders).

The following instructions describe the creation of a new folder. As an example, the subfolder `Research` is created in the folder `Documents`. You require the add-item privilege (see Section 7.2.2) for the target folder (`Documents`):

1. Open the Folders (see Section 3.1).

2. In the navigation tree on the left, select the target folder in which the new folder is to be created (here: `Documents`).

3. Activate the `List` or `Symbols` tab on the right and choose menu option `File > New…`:

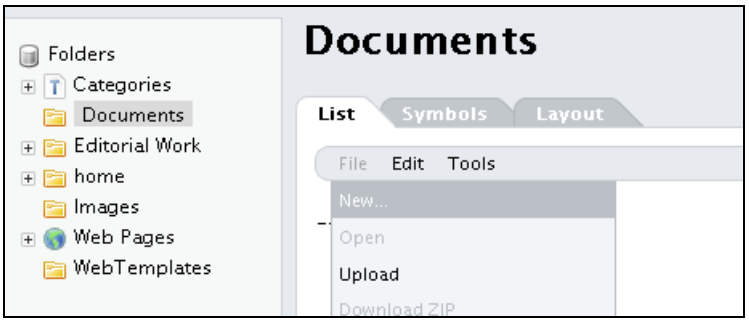


Figure 26: Calling File › New...

A selection dialog opens:

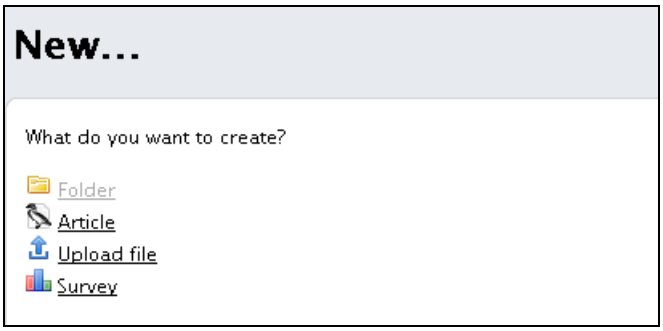


Figure 27: Defining the Type of the New Entry, here: Folder

4. Click on `Folder`.

The properties dialog opens for the new folder:

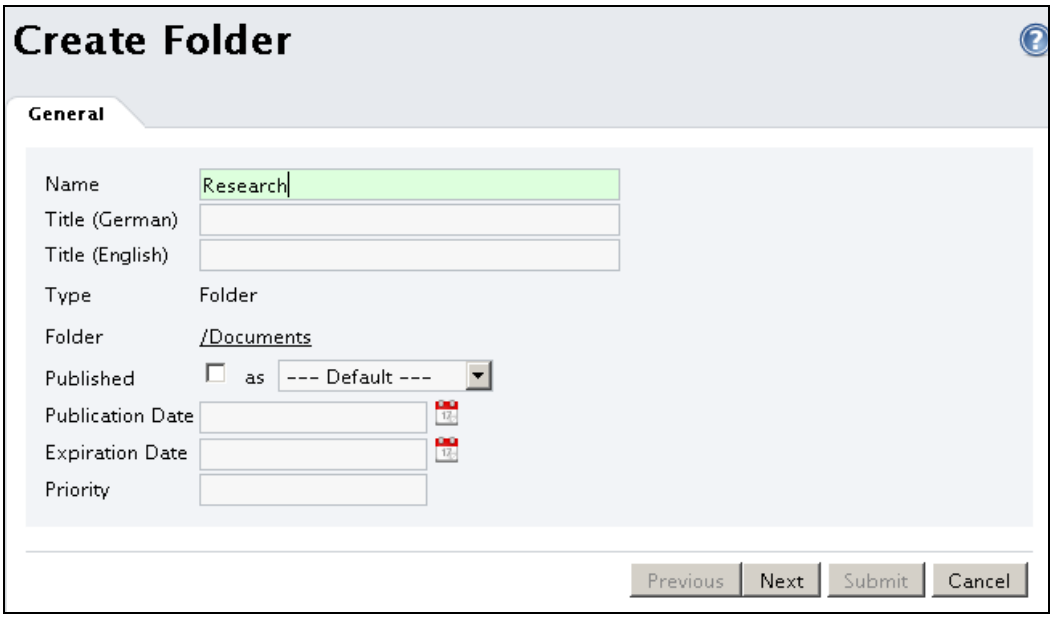


Figure 28: Defining the Properties of the New Folder

5. Enter at least the following information:

a. `Name` (here: `Research`)

b. `Title` and `Publication Date` (if the folder is to be visible in the portal, see Section 4.1.4)

Note: The button `Next` guides you through the screens of the properties dialog (see Section 3.3.1).

6. Go to the final screen of the properties dialog (button `Next`) and confirm the dialog with `Submit`.

   The folder is created.

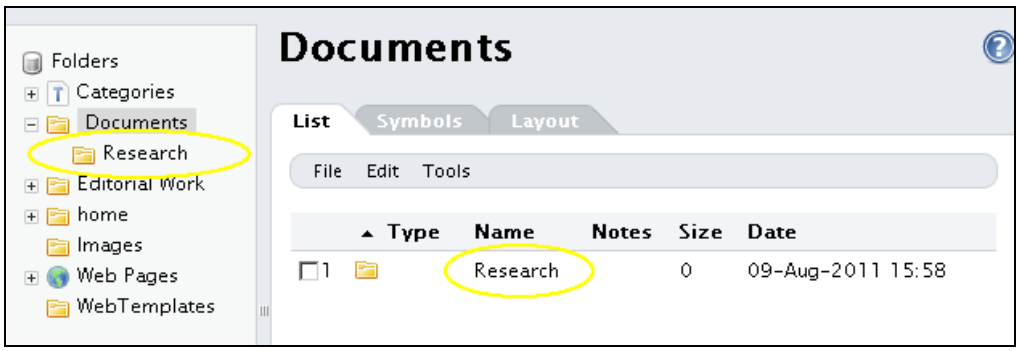


Figure 29: Folder "Research" Created in "Documents" Directory

Note: Alternatively you can use the layout preview to create folders (see Section 3.2.4.2).

3.5.2 Uploading Documents

Many types of documents such as PDFs or images originate outside inxire ECM. You have to upload these into the system.

The following instructions describe the steps required: The folder `Research` is assumed to be the target folder. To upload documents, you require the add-item privilege (see Section 7.2.2) for the target folder.

1. Open the Folders (see Section 3.1).
2. In the navigation tree on the left, select the folder into which the documents are to be uploaded (here: `Research`).
3. Activate the `List` or `Symbols` tab on the right and choose menu option `File > Upload`:

Figure 30: Calling File › Upload

The upload dialog opens:

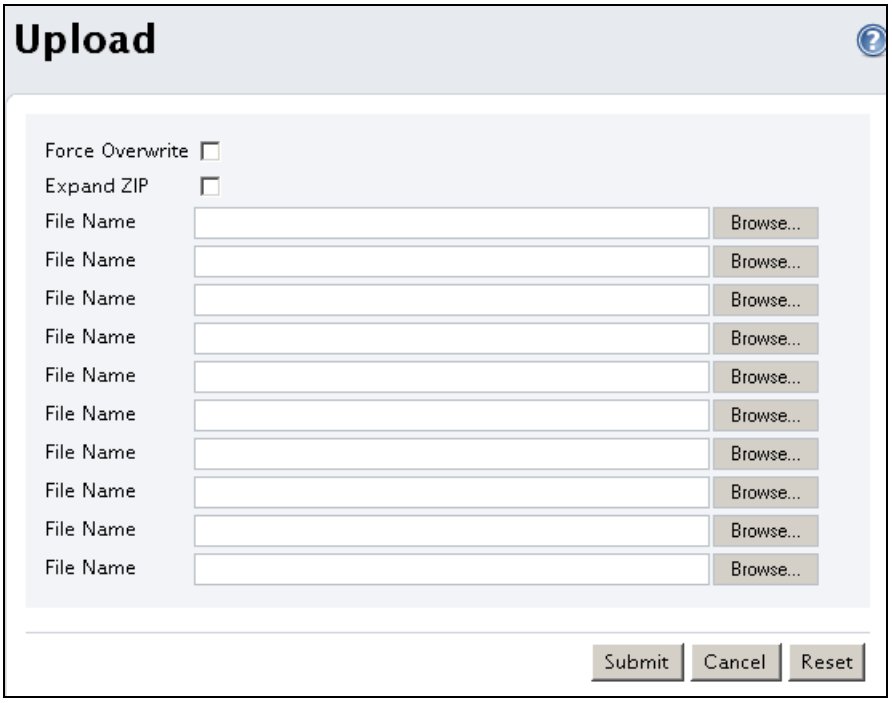


Figure 31: Upload Dialog

4. For each file that you wish to upload:

    a. Click on the button `Browse...` (depending on the browser used).

    The file selection dialog of your browser opens.

    b. Select the file and choose `Open` (can differ depending on the browser).

    The selection dialog closes again and the path of the new file is transferred to the field `File Name`.

    You can select up to 10 files.

5. Confirm the upload dialog with `Submit`.

The new files are uploaded to the folder (`Research`).

Note: Using the button `Cancel`, you can exit the upload dialog at any time without uploading the files. The button `Reset` clears all entries.

Note: To overwrite an existing document (with the same name), activate the check box `Force Overwrite`. Alternatively, flag the existing document with a check mark before calling the upload dialog (see Section 3.5.3).

Note: The option `Expand ZIP` is described in Section 3.5.13.

3.5.3 Editing a Document on the PC

Some documents such as Microsoft Office files cannot be processed within inxire ECM. You have to download these files, process them on your PC and then upload them into the system again.

The steps required:

1. Open the Folders (see Section 3.1).
2. In the navigation tree on the left, select the folder where the document is located.
3. Activate the `List` or `Symbols` tab on the right and click on the name of the document.

   The browser offers the facility to `Open` or `Save` the document (dialog differs depending on the browser):

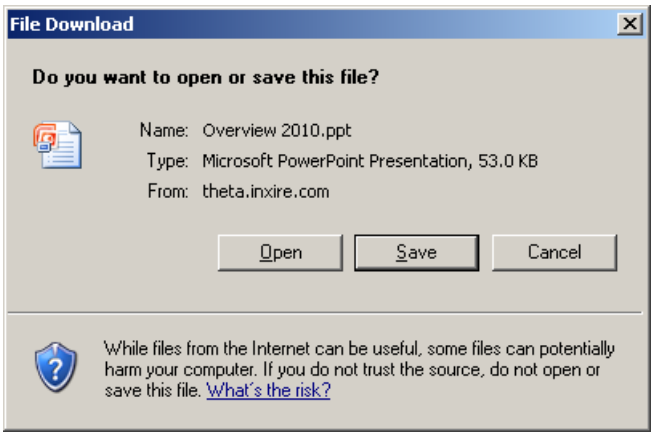

File Download
Do you want to open or save this file?
Name: Overview 2010.ppt
Type: Microsoft PowerPoint Presentation, 53.0 KB
From: theta.inxire.com
Open
Save
Cancel
While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?

Figure 32: Download Dialog of the Internet Explorer

4. Choose the option `Save`.

   The subsequent dialog can differ depending on the browser and operating system. Usually you have to define a location to save to, for example, the desktop; you then check the file name and choose the button `Save`.

5. Edit the saved file on your PC.
6. Finally, upload the document to inxire ECM again (see Section 3.5.2):

   a. In the inxire ECM Web application, open the folder in the content repository where the document is located (see above).

b. Select the list or symbols view and flag the document with a check mark.

c. Call the menu option `File > Upload`.

   The upload dialog opens in overwrite mode:

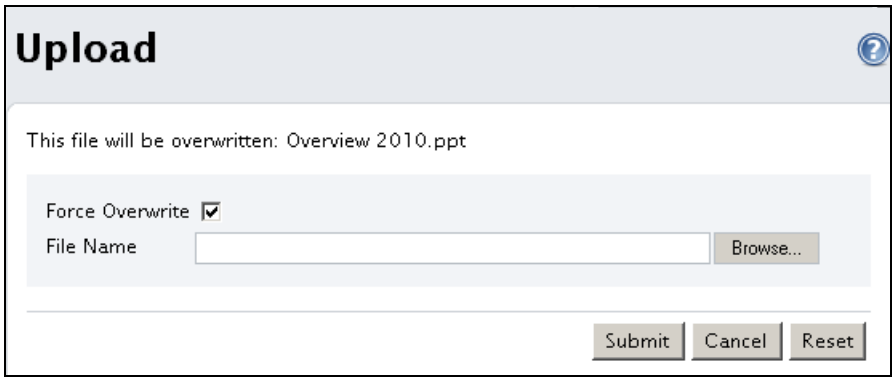


Figure 33: The Upload Dialog in Overwrite Mode

d. Click on `Browse…` (label can differ depending on browser) and select the revised file in the subsequent dialog.

   The path of the local file is transferred to the field `File Name`.

e. Finally `Submit` the upload dialog.

The content of the document is overwritten with the content of the local file.

3.5.4 Converting a Document Into a Versioned Document

The advantage of versioned documents is that old versions are retained. For an introduction to versioned documents, see Section 3.1.4.

Each document in the Folders can be converted into a versioned document using the following steps:

1. Open the Folders (see Section 3.1).
2. In the navigation tree on the left, select the folder where the document is located.
3. Activate the `List` or `Symbols` tab on the right.
4. Flag the required document with a check mark and choose menu option `Tools > Make Versioned`.

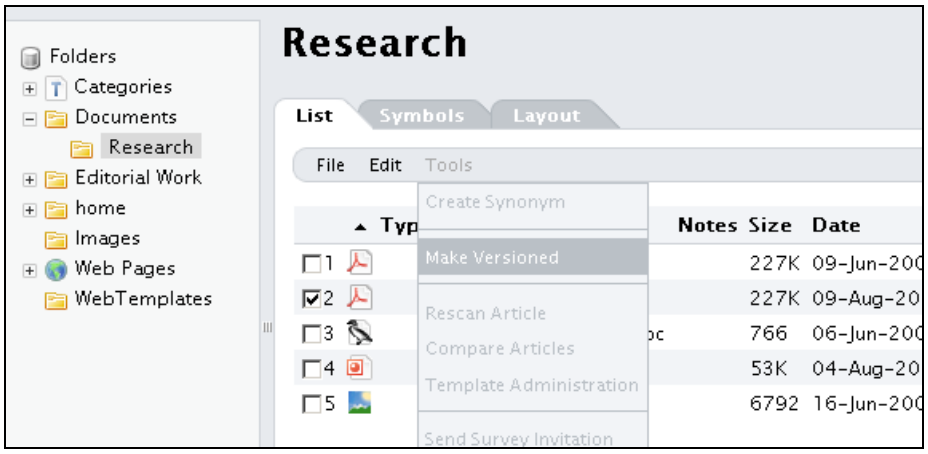


Figure 34: Making a Document Versioned

You are requested to enter a comment.

Note: Each version has a comment. This is the comment for the first version.

5. Enter a comment and confirm the dialog with `OK` (label can vary).

   The document is converted into a versioned document.

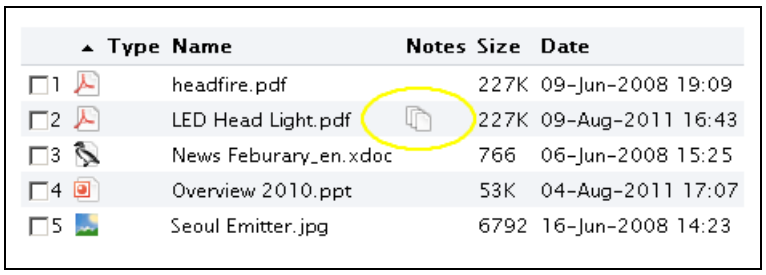


Figure 35: Versioned Document

Note: You can recognize versioned documents by the note (versioned). A click on the symbol takes you to the version history (see Section 3.5.6).

3.5.5 Editing a Versioned Document

Before editing a versioned document, you must reserve it. Then you can carry out any number of editing steps. Your changes only become visible for other users after you have released them and thus generated a new version.

For an introduction to versioned documents, see Section 3.1.4.

The following instructions describe the exact procedure:

1. Open the Folders (see Section 3.1).
2. In the navigation tree on the left, select the folder where the document is located.
3. Activate the `List` or `Symbols` tab on the right.
4. Flag the versioned document with a check mark and choose menu option `Edit > Reserve`.

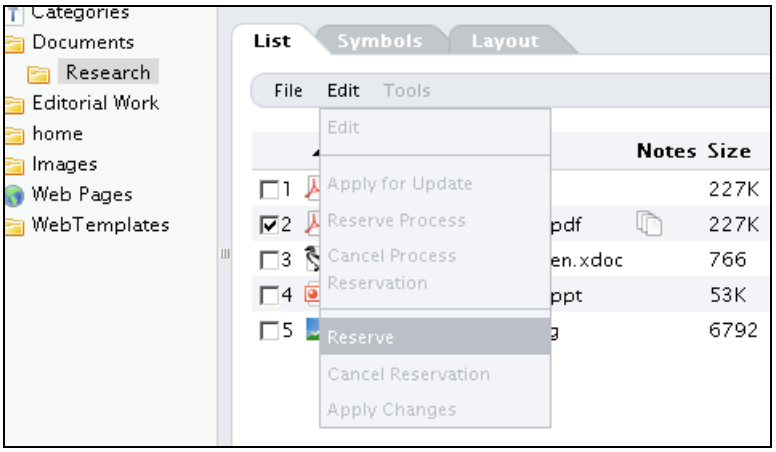


Figure 36: Reserving a Versioned Document

You are requested to enter a reservation comment. Other users can view this comment in the version history (see Section 3.5.6).

5. Enter a reservation comment and confirm the dialog with `OK` (label can vary).

   The document is reserved exclusively for you.

6. Carry out any editing steps required.

   You can edit a reserved document in the normal way. All menu options are available.

   Note: You are working on a copy of the document. This means that other users cannot see your changes.

7. When you are finished editing you must release your changes as a new version:

   a. Flag the document with a check mark and choose menu option `Edit > Apply Changes`:

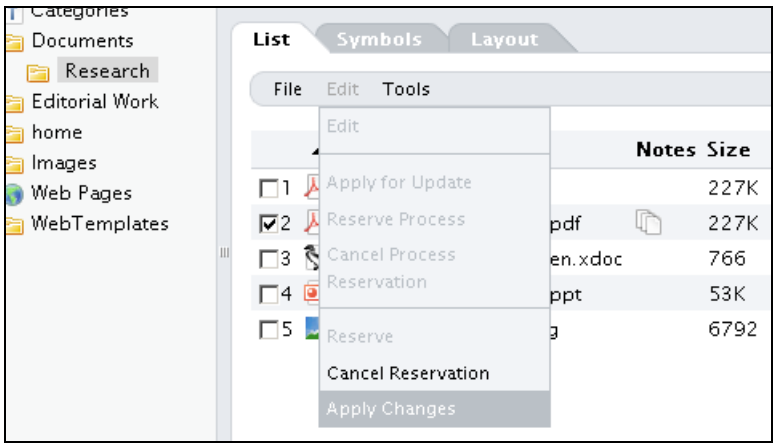


Figure 37: Applying Changes to a Versioned Document

You are requested to enter a comment:

Caution: Do not use menu option `Cancel Reservation`, this undoes all your changes!

b. Enter a comment for the new version and confirm the dialog with `OK` (label can vary).

   Your working copy becomes the new version.

Note: If you wish to cancel editing, use menu option `Edit > Cancel Reservation`. All changes are – after confirmation – undone.

Note: You can find an overview of all versions in the version history (see Section 3.5.6).

3.5.6 Viewing the Version History

In the version history you can view all versions of a versioned document. Here you can also check if the document was reserved – and if so, by whom.

Various editing functions are available:

- `File > Copy`

  Copies the flagged version into a different folder.

- `Edit > Reserve`

  Reserves the document; the flagged version becomes the working copy. This function is especially useful if the current version contains no data or incorrect data.

  Caution: Any changes made in the meantime are lost if any version other than the last one is flagged!

- `Edit > Remove Version`

  Removes the flagged version. This function is only available to the system administrator.

For an introduction to versioned documents, see Section 3.1.4.

To call the version history, proceed as follows:

1. Open the Folders (see Section 3.1).
2. In the navigation tree on the left, select the folder where the document is located.
3. Activate the `List` or `Symbols` tab on the right and click on the symbol (versioned) next to the file name:

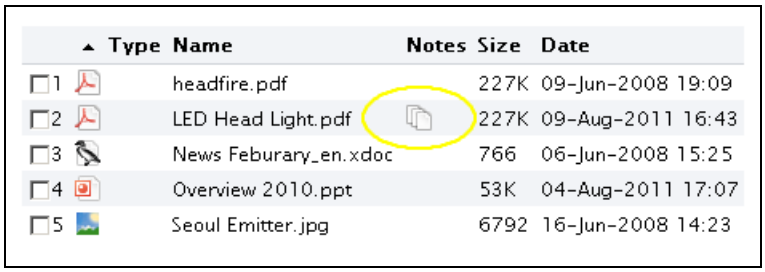

Type Name Notes Size Date
1 headfire.pdf 227K 09-Jun-2008 19:09
2 LED Head Light.pdf 227K 09-Aug-2011 16:43
3 News Feburary_en.xdoc 766 06-Jun-2008 15:25
4 Overview 2010.ppt 53K 04-Aug-2011 17:07
5 Seoul Emitter.jpg 6792 16-Jun-2008 14:23

Figure 38: Opening the Version History

The version history opens:

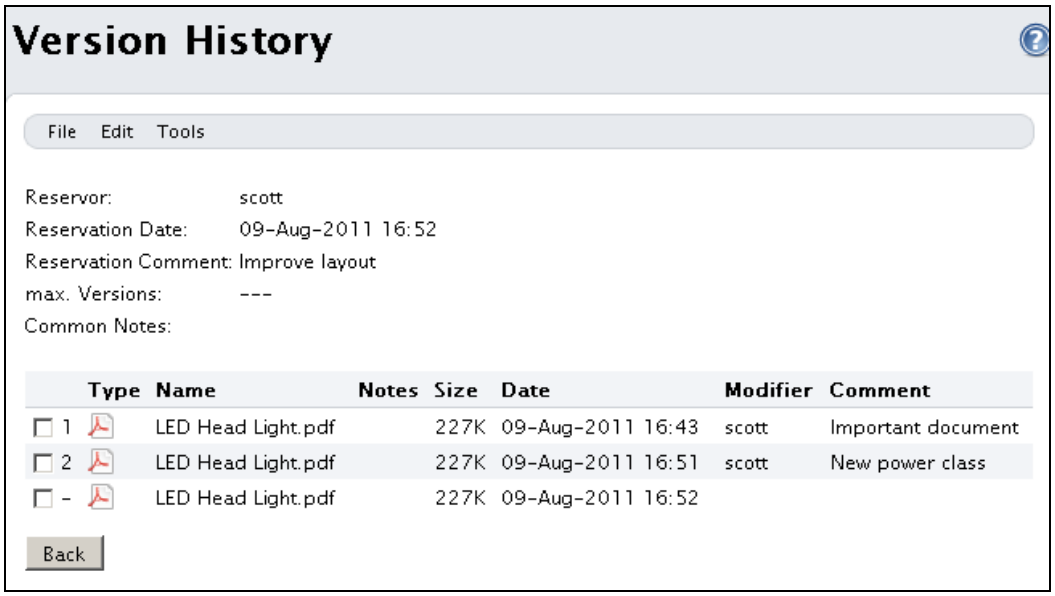

Version History
File Edit Tools
Reservor: scott
Reservation Date: 09-Aug-2011 16:52
Reservation Comment: Improve layout
max. Versions: ---
Common Notes:
Type Name Notes Size Date Modifier Comment
1 LED Head Light.pdf 227K 09-Aug-2011 16:43 scott Important document
2 LED Head Light.pdf 227K 09-Aug-2011 16:51 scott New power class
- LED Head Light.pdf 227K 09-Aug-2011 16:52
Back

Figure 39: Version History

Note: In the figure above, the individual versions are listed with number, date and comment. The "–" indicates the current working copy. As you can see from the upper part of the screen, the document has been reserved by user `scott`.

3.5.7 Copying or Moving

Occasionally you may have to copy or move contents from one folder to another. You can do this quite easily using the File menu. You can move any number of documents, subfolders or special objects (see Section 3.1.3) simultaneously.

To move objects, you require the add-item privilege (see Section 7.2.2) in both the source and target folders. To copy, the add-item privilege for the target folder is sufficient.

The steps in detail:

1. Open the Folders (see Section 3.1).
2. In the navigation tree on the left, select the folder where the contents are currently located.
3. Activate the `List` or `Symbols` tab on the right and flag all required entries:

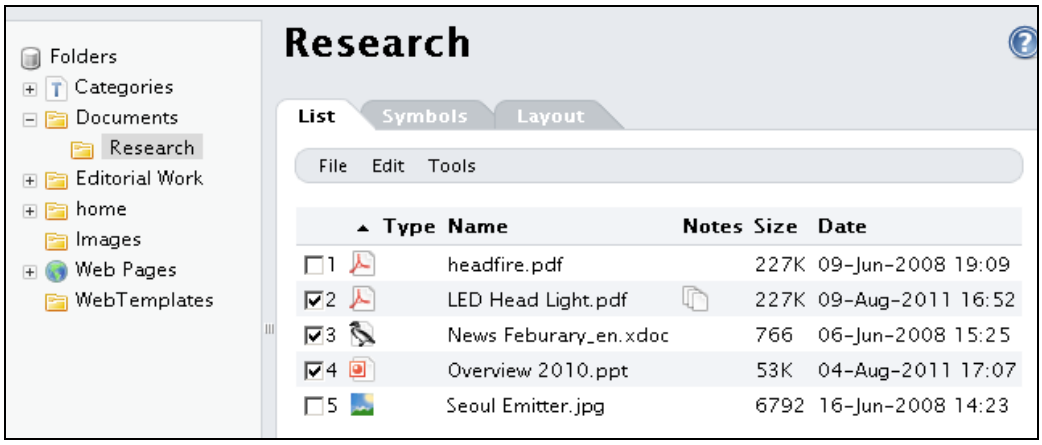


Figure 40: Selecting Documents to Copy or Move

4. Then choose menu option `File > Copy` (or `File > Move`).

   A selection dialog opens for the target folder:

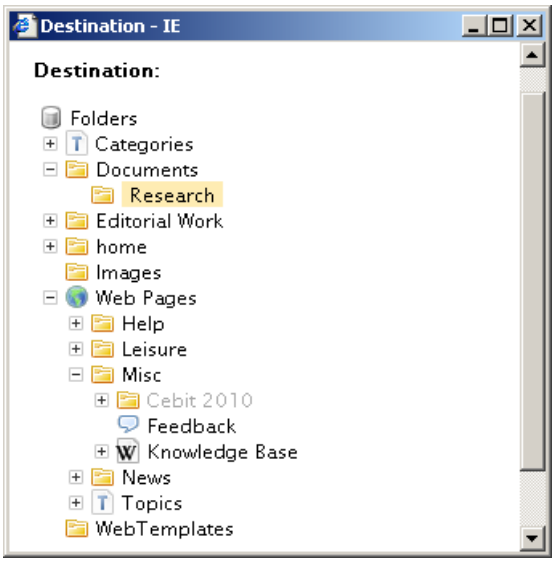


Figure 41: Selecting the Target Folder

   Note: You can open closed folders by clicking on the plus sign (see Section 2.4.2.4).

5. Select the target folder by clicking on the name (here: `Cebit 2010`).

   The selected objects are copied or moved to the target folder.

Note: Alternatively you can copy or move the contents with drag & drop (see Section 3.5.8).

3.5.8 Copying or Moving with Drag & Drop

Documents, folders and other special objects can also be copied or moved using drag & drop functionality (see Section 3.5.7).

1. Open the Folders (see Section 3.1).

2. In the navigation tree on the left, select the folder where the contents are currently located.

3. Activate the `List` or `Symbols` tab on the right and flag all required entries:

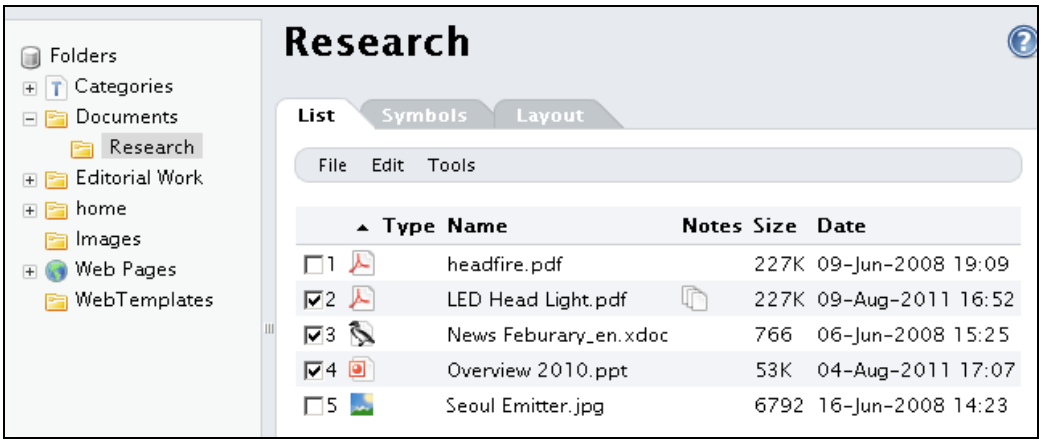


Figure 42: Selecting Documents to Copy or Move

4. Press the left mouse key over one of the names, keep it pressed, drag the entry to the target folder and release the mouse key.

   Note: The target folder can be both in the directory on the right and in the navigation tree on the left.

   Note: If you wish to copy or move only one entry, you do not have to flag it first. This occurs automatically.

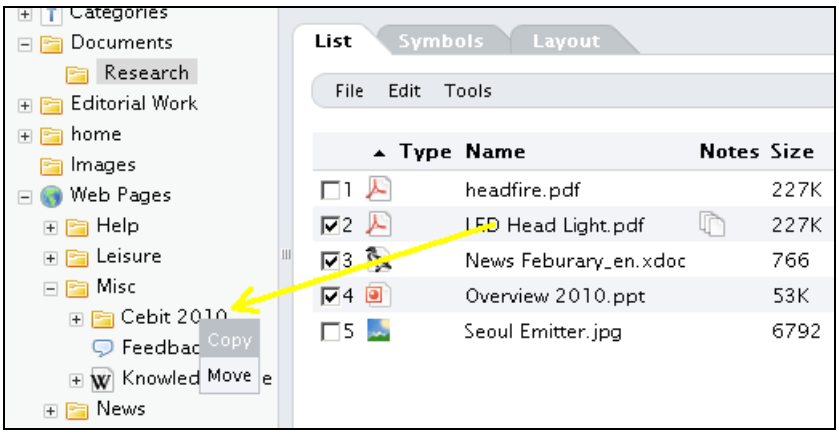


Figure 43: Drag & Drop in the File Manager

   A small menu appears with the entries `Copy` and `Move`.

5. Click on the required function. The menu closes and the objects are copied or moved to the target directory.

Note: The drag & drop functionality can also be used in the search results list.

Note: You can open closed areas in the navigation tree on the left by clicking on the plus sign (see Section 2.4.2.4).

3.5.9 Creating a Copy in the Same Folder

To create a copy of a document, folder or other object in the same directory, you can use the function `Copy and Rename`:

1. Open the Folders (see Section 3.1).
2. In the navigation tree on the left, select the folder where the document or folder is located.
3. Activate the `List` or `Symbols` tab on the right and flag the required entry with a check mark.

   You must select one entry only.
4. Then choose menu option `File > Copy and Rename`.

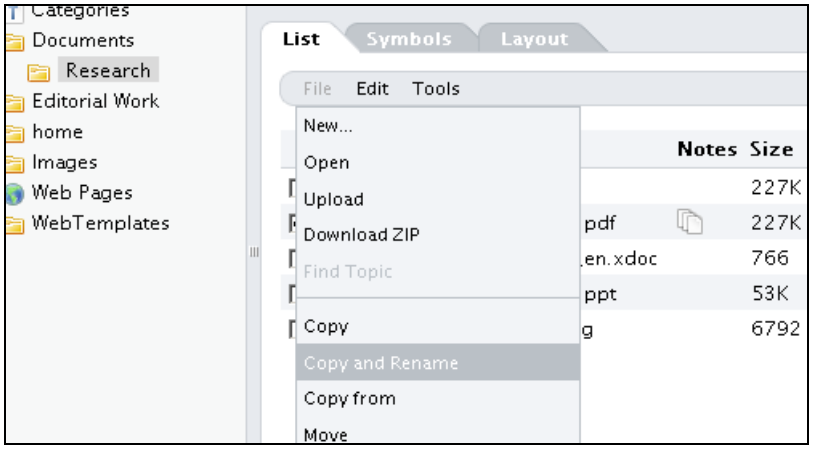


Figure 44: Calling "Copy and Rename"

You are requested to enter the new name (the dialog can differ slightly depending on the browser):

Figure 45: Entering the New Name

5. Enter the new name and confirm the dialog with `OK` (label can vary).

   A copy of the selected entry is created in the same directory:

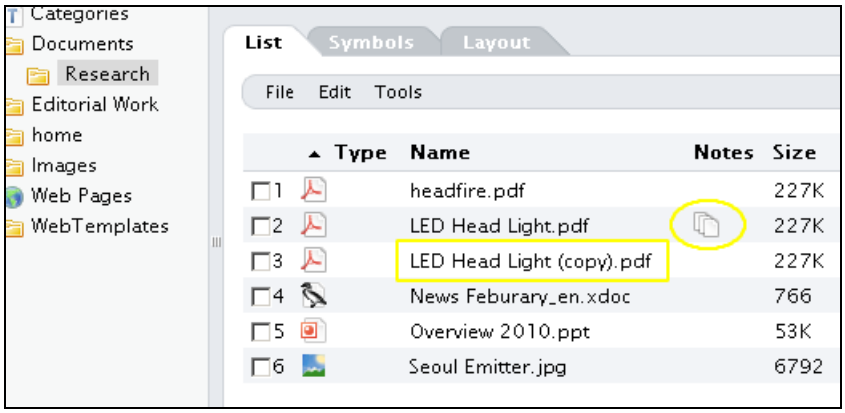


Figure 46: Copy Has Been Created

Note: When you copy, an identical object with the same properties is created. Folders are copied with their entire contents including subfolders.

Caution: In the case of a versioned document, only the current version is copied (see Figure 46)!

3.5.10 Restoring Deleted Entries

If you delete an entry from the Folders, this is not removed from the system immediately but is first moved to the wastebasket. Within the storage period (typically 30 days), you can restore the entry at any time, that is, return it to its original folder. It is also possible to restore the entry to any other folder.

To restore entries, you require the add-item privilege for the target folder and write privileges for the deleted entry (see Section 7.2.2).

The steps in detail:

1. Open the editorial view (see Section 2.4).
2. Navigate to the wastebasket via the main navigation (on the right).

   The wastebasket opens.

   Note: Per default, all entries that you have deleted or which belong to you (owner) are displayed. Using the search and filter options, you can – with the appropriate authorization – also view the wastebasket of other users (see context help).
3. Select all entries that you wish to restore and choose menu option `File > Restore`:

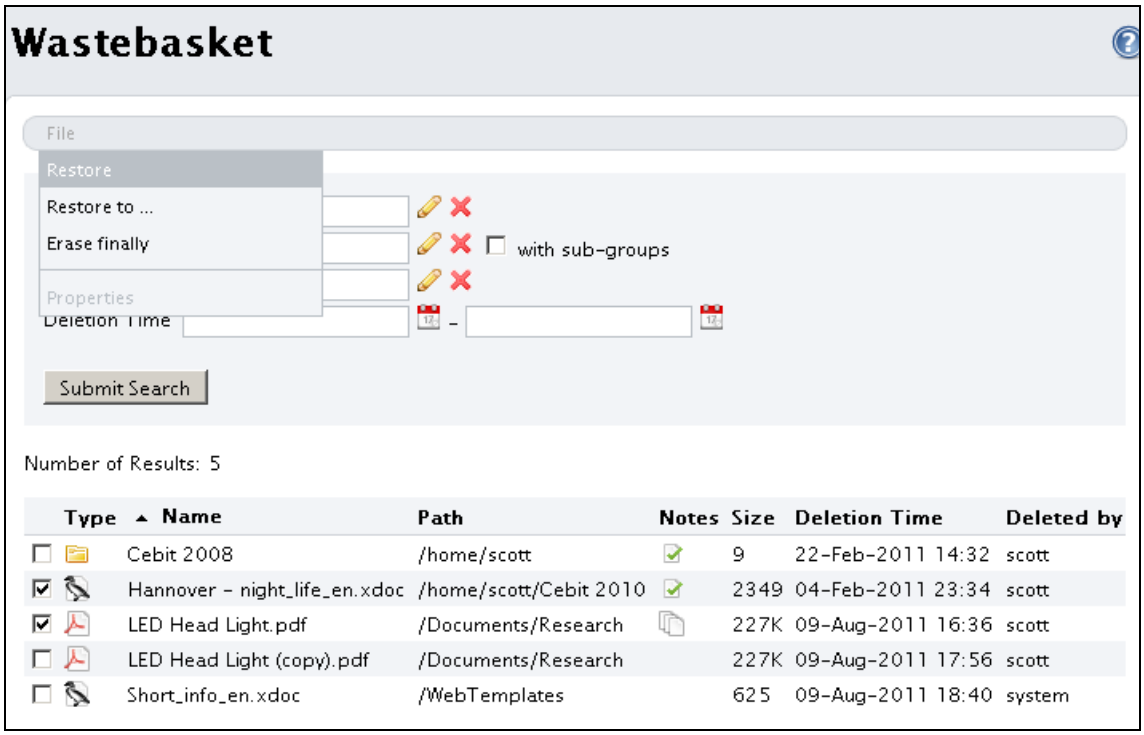


Figure 47: Restoring Deleted Entries

You can select any number of documents, subfolders and other objects (see Section 3.1.3).

Note: To restore the entries to a different folder, you use the menu option `File > Restore to`. A selection dialog opens for the target folder (select by clicking on the name).

3.5.11 Emptying the Wastebasket

Entries in the wastebasket are deleted automatically after the storage period has expired (typically 30 days, ask your system administrator).

Alternatively, you can also delete entries in the wastebasket manually:

1. Open the editorial view (see Section 2.4).
2. Navigate to the wastebasket via the main navigation (on the right).

   The wastebasket opens.

   Note: Per default, all entries that you have deleted or which belong to you (owner) are displayed. Using the search and filter options, you can – with the appropriate authorization – also view the wastebasket of other users (see online help).
3. Select the entries that you wish to remove permanently from the system.

   Note: To quickly select all entries, use the function `Select All` in the context menu over any check box (right mouse click under Windows, other operating systems may differ).

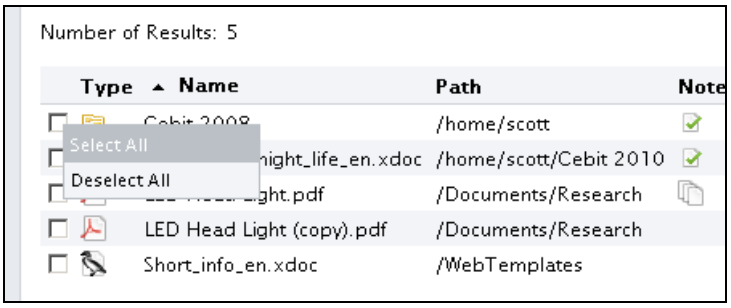


Figure 48: Selecting All Entries in the Wastebasket

4. Use the File menu or the context menu over the file name to call the function `Erase Finally`:

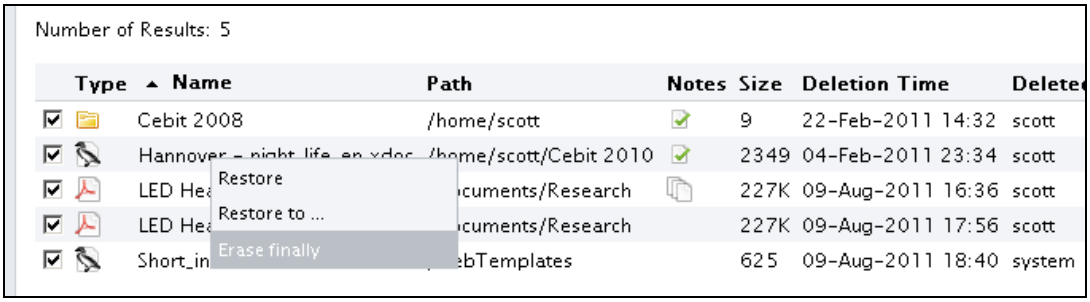


Figure 49: Deleting Entries Permanently From the Wastebasket

All selected entries are – after confirmation – permanently removed from the system.

3.5.12 Downloading a ZIP Archive

You can download single documents quickly and easily by clicking on the name (see Section 3.2). If you wish to save multiple documents or entire directory trees locally, this procedure can become quite time-consuming.

This is where the ZIP download helps: You can use this to download multiple documents or entire folders as a ZIP archive (here, for example, the folder `/Web Pages/News`):

1. Open the Folders (see Section 3.1).
2. In the navigation tree on the left, select the superordinate folder (here: `/Web Pages`).
3. Activate the `List` or `Symbols` tab on the right and flag the required entry with a check mark (here the folder: `News`).

   You can select any number of documents and folders.
4. Choose menu option `File > Download ZIP`.

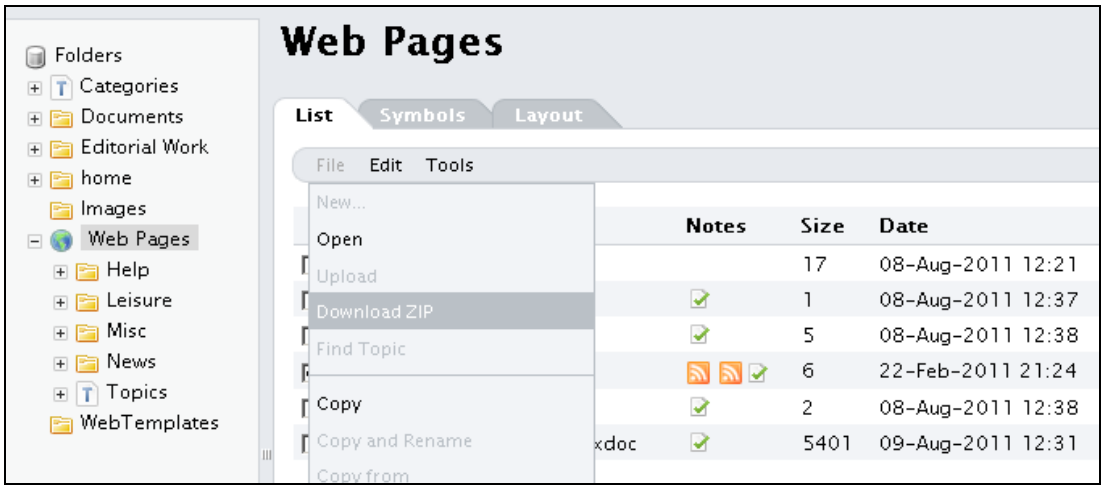


Figure 50: Downloading a ZIP Archive

The browser offers the facility to `Open` or `Save` the document (dialog differs depending on the browser):

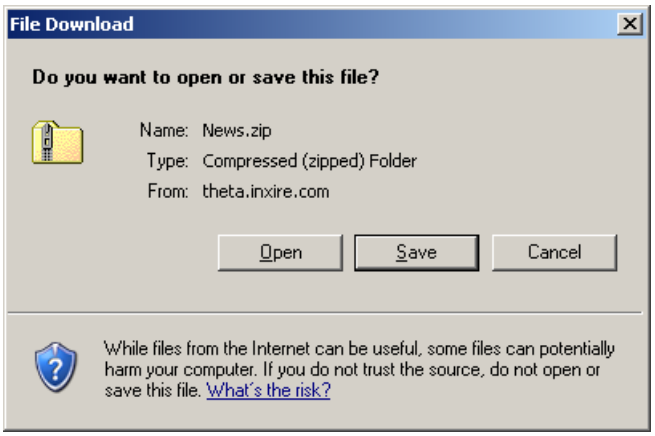

File Download
Do you want to open or save this file?
Name: News.zip
Type: Compressed (zipped) Folder
From: theta.inxire.com
Open
Save
Cancel
While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?

Figure 51: Download Dialog of the Internet Explorer (ZIP Archive)

5. Choose the option `Save`.

   The subsequent dialog can differ depending on the browser and operating system. Usually you must define a location to save to, check the file name and choose the button `Save`:

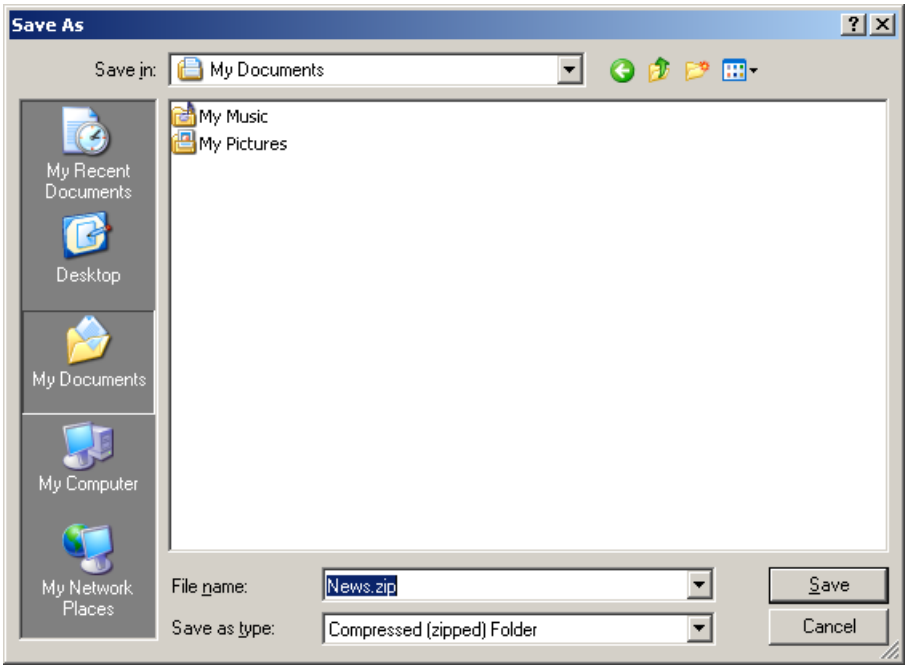


Figure 52: "Save as" Dialog (Internet Explorer)

The ZIP archive is stored on your PC.

Note: In addition to the documents and folders, the ZIP archive contains an RDF file under `/META-INF/meta.rdf` (Resource Description Framework in accordance with W3C Standard, references in Appendix 10.6.4). This saves important metadata; for a description, see Appendix 10.2.

3.5.13 Uploading a ZIP Archive

If entire directory trees are to be uploaded into the system, uploading single documents using the upload dialog is inefficient (see Section 3.5.2).

A more convenient method is to upload a ZIP archive. The archive can be created using common tools on any PC and can be uploaded with the upload dialog. Select the check box `Expand ZIP`:

1. Open the Folders (see Section 3.1).
2. In the navigation tree on the left, select the folder into which the contents of the archive are to be uploaded.
3. Activate the `List` or `Symbols` tab on the right and choose menu option `File > Upload` (see Figure 30).

   The upload dialog opens (see Figure 31).
4. Flag option `Expand Zip` with a check mark.

5. For each archive that you wish to upload:

    a. Click on the button `Browse…` (depending on the browser used).

    The file selection dialog of your browser opens.

    b. Select the ZIP archive and choose `Open` (can differ depending on the browser).

    The selection dialog closes again and the path of the new file is transferred to the field `File Name`.

    You can select up to 10 ZIP archives or single files.

6. Confirm the upload dialog with `Submit`.

    The archives are unpacked and the files contained are uploaded to the Folders.

Note: If the ZIP archive contains an RDF file (under `/META-INF/meta.rdf`), all the meta-attributes defined there are copied automatically. For a list of the supported RDF attributes, see Appendix 10.2.

3.5.14 Changing Properties Recursively

You can view and – with the appropriate authorization – modify the properties of documents, folders and other objects in the properties dialog (see Section 3.3).

Sometimes, however, you need to make the same change to all the contents of a folder and its subfolders, for example, modifying the publication date and the work group. In this case, the quickest method is to use the option `Recursive Update` (demonstrated here with folder `/Documents/Research`):

1. Open the Folders (see Section 3.1).
2. In the navigation tree on the left, select the superordinate folder (here: `/Documents`).
3. Activate the `List` or `Symbols` tab on the right.
4. Select your start folder (`Research`) and choose menu option `File > Properties (rec)`:

    The abbreviated properties dialog opens (see Section 3.3.2), the option `Recursive Update` is set automatically:

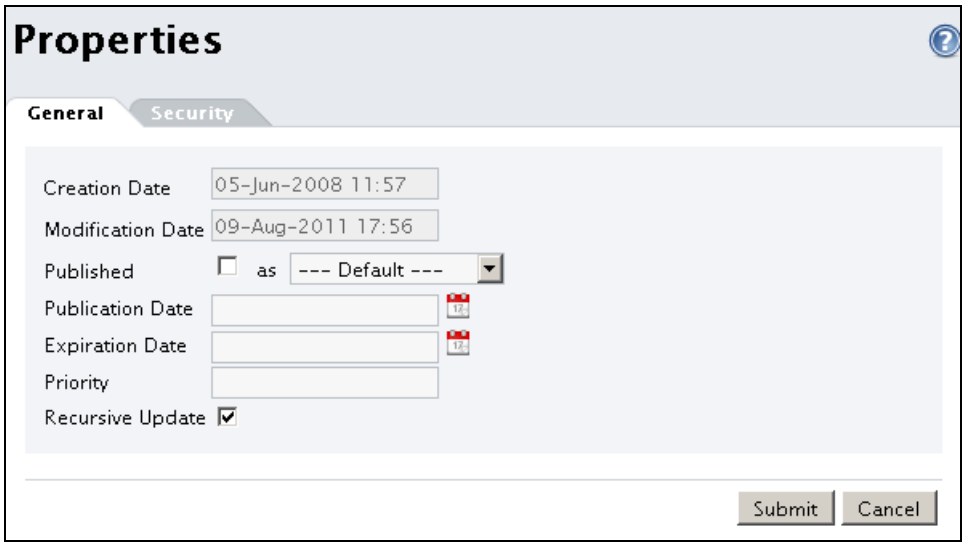


Figure 53: Properties Dialog (Recursive)

Note: The tab `Security` is only visible in expert mode (see Section 2.4.1.2).

5. Make all required changes.

   For detailed information on the use of the properties dialog, see Section 3.3.

   Note: Only the changed properties are updated later for the folder and all its contents. You can recognize these by the white background (no change yet in the figure).

6. Confirm the dialog with `Submit`.

   The changes are applied to the opened folder and all its contents and subfolders.

3.5.15 Renaming

You rename documents or directories using the properties dialog. Call the dialog and enter the new name in the field `Name` (see Section 3.3).

3.5.16 Publishing

Only published documents and folders are visible in the portal (see Section 4.1.4). In some cases publication occurs automatically, for example, if you use the layout preview for creation of new contents (see Section 3.2.4.2).

Alternatively, you publish manually in the properties dialog:

1. Open the Folders (see Section 3.1).
2. In the navigation tree on the left, select the folder where the entry to be published is located.
3. Activate the `List` or `Symbols` tab on the right, flag the entry with a check mark, and choose menu option `File > Properties`.

The properties dialog opens.

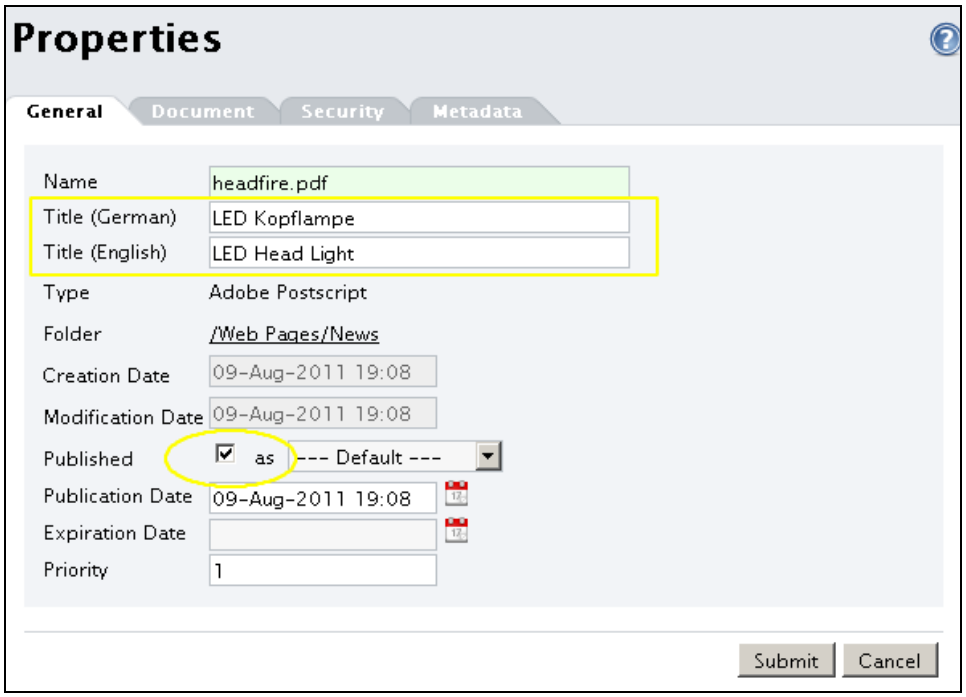


Figure 54: Publishing in the Properties Dialog

4. Set a title for each language for which the entry is to be visible, that is, a designation in this language.

   Note: For Web articles, the title is taken automatically from the content (see Section 4.3).

5. Flag the field `Published` with a check mark.

   A publication date (today) is set automatically.

6. If necessary, select a page template (`as` …), an expiration date and a priority (see Section 3.3.3).

   Caution: It is possible that contents are automatically moved to the wastebasket after the expiration date has passed. Consult your system administrator!

7. Finally, confirm the properties dialog with `Submit`.

   The entry is published.

Note: Section 4.1.4 explains why portal contents must be published.

3.5.17 Setting Access Privileges

A sophisticated access control system regulates access to each individual entry in the Folders (see Chapter 7). Normally, access privileges are assigned automatically by the system so the user does not have to deal with these.

If required, you can open the properties dialog at any time and modify the access privileges manually. To do this, you must first switch to expert mode (see Section 2.4.1.2):

1. Open the Folders (see Section 3.1).
2. Click on `Expert` (at the top of the page).
3. In the navigation tree on the left, select the folder where the required entry is located.
4. Activate the `List` or `Symbols` tab on the right, flag the required entry with a check mark, and choose menu option `File > Properties`.

   The properties dialog opens (see Figure 17).

   Note: You can also select multiple entries or use function `File > Properties (rec)`.
5. Switch to the tab page `Security`:

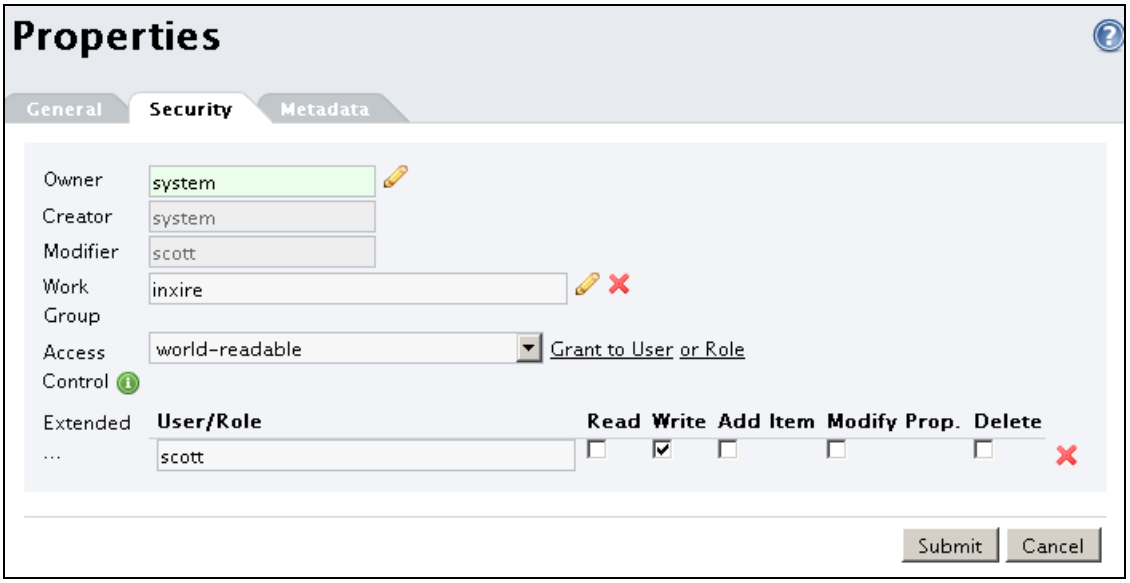


Figure 55: "Security" Screen in the Properties Dialog

6. Here you can modify:

   a. `Owner`: The owner can see the entry at any time and can make changes as required.

   b. `Work Group`: The entry is assigned to this work group (if the selected access control list does not allocate any privileges to roles, the work group is optional).

   c. `Access Control`: Here you can select one of the predefined access control lists (standard ACL, see Section 7.3). This defines which access privileges the individual roles in the work group are to receive.

d. `Extended...`: Here you can assign additional privileges to individual users or to the roles of other work groups (only in exceptional cases, description of the privileges in Section 7.2.2).

For instructions on using the screen, see Section 3.3.5.

7. Finally, confirm your changes with `Submit`.

   The access control is modified.

Remark: For an introduction to the access control system, see Chapter 7 "Access Control". Work groups and roles are described in Chapter 6 "Group Admin".

3.5.18 Displaying Notes

Notes are additional properties that are assigned to entries in the Folders, whether they are documents, folders or special objects. These notes contain either technical information such as the height and width of an image or they represent additional functionality, for example, a news channel (see Section 5.6.3).

For an overview of all notes, see Section 3.4.

To display the notes for an entry, proceed as follows:

1. Open the Folders (see Section 3.1).
2. In the navigation tree on the left, select the folder where the required entry is located.
3. Activate the `List` or `Symbols` tab on the right, flag the required entry with a check mark, and choose menu option `File > View Notes`.

   An overview of the notes appears:

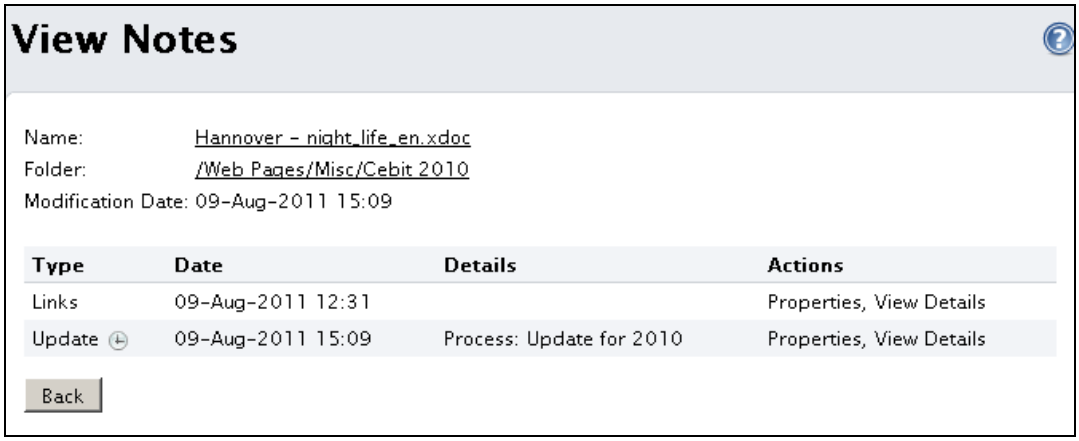


Figure 56: Notes of an Article

If you require more detailed information on a note, you should follow the link `View Details` in column `Actions`.

Note: The screen `View Notes` is described in Section 3.4.2.

3.5.19 Viewing Relations

The entries in the Folders are inter-related based on various criteria.

- Web articles refer to other documents and folders (hyperlinks, see Section 3.4.3).
- Images are integrated into Web articles (see Section 3.4.3).
- Documents and especially Web articles can be assigned to topics (keywords, see Section 3.3.6).

All these relationships together form a semantic knowledge network. Using the function `File > View Relations`, you can view all the relationships of an entry:

1. Open the Folders (see Section 3.1).
2. In the navigation tree on the left, select the folder where the required entry is located.
3. Activate the `List` or `Symbols` tab on the right, flag the required entry with a check mark, and choose menu option `File > View Relations`.

   A list appears showing all the relations from and to the selected entry:

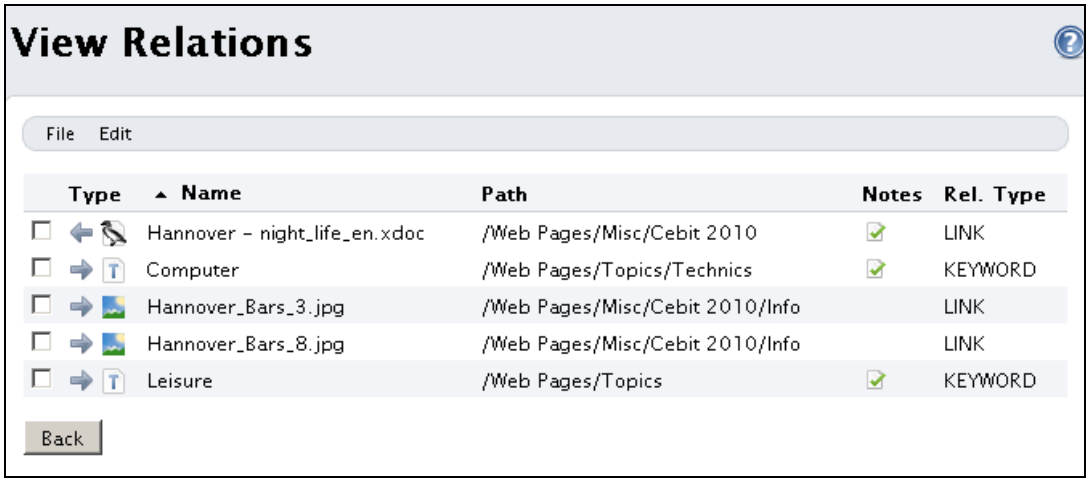

View Relations
File Edit
Type Name Path Notes Rel. Type
Hannover – night_life_en.xdoc /Web Pages/Misc/Cebit 2010 LINK
Computer /Web Pages/Topics/Technics KEYWORD
Hannover_Bars_3.jpg /Web Pages/Misc/Cebit 2010/Info LINK
Hannover_Bars_8.jpg /Web Pages/Misc/Cebit 2010/Info LINK
Leisure /Web Pages/Topics KEYWORD
Back

Figure 57: Relations of Article "Ernst August Brewery_en.xdoc"

   In column `Type` you can see the direction of the relation. The columns `Name`, `Path` and `Notes` describe the target or source of the relation. The type of the relation is specified under `Rel. Type` where `LINK` stands for a hyperlink or an embedded image and `KEYWORD` for a keyword relation.

   In the figure you can see five relations:

   - The article `Hannover – night_life_en.xdoc` has a hyperlink to this article.
   - This article is assigned to the topics (keywords) `Computer` and `Leisure`.

- And it contains the images `Hannover_Bars_3.jpg` and `Hannover_Bars_8.jpg`.

Note: You can access menu functions using the menu bar on the top or the context menu. For example, you can display the relations of a linked entry and thus follow the knowledge network.

3.5.20 Linking an Entry with a Second Folder

Only a system administrator can link an entry in the Folders with a second folder!

In exceptional cases, it can be necessary to link a document, a folder or a special object with a second folder. You do this by way of the menu option `File > Hard Link` (demonstrated here using the folder `/Documents/Research`, which is also to be integrated under `/Web Pages`):

1. Log in as system administrator (`system`).
2. Open the Folders (see Section 3.1).
3. In the navigation tree on the left, select the folder where the required entry is located (here: `/Documents`).
4. Activate the `List` or `Symbols` tab on the right and flag the required entry with a check mark (here: `Research`).

   You can select multiple entries.
5. Then choose menu option `File > Hard Link` (this can only be seen by a system administrator).

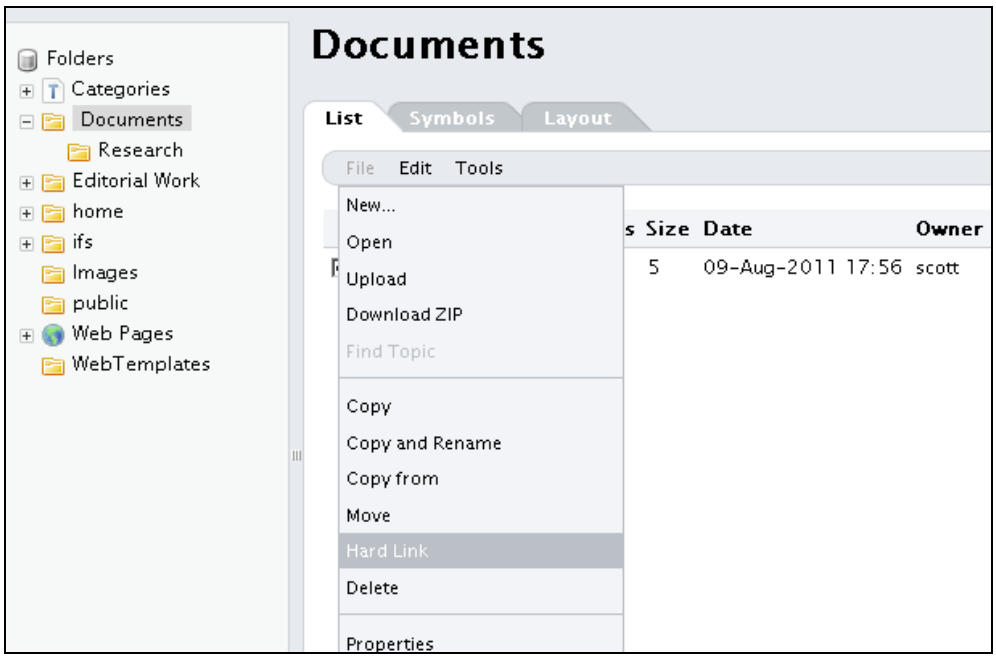


Figure 58: Linking a Folder Entry with a Second Folder

A selection dialog opens for the second folder.

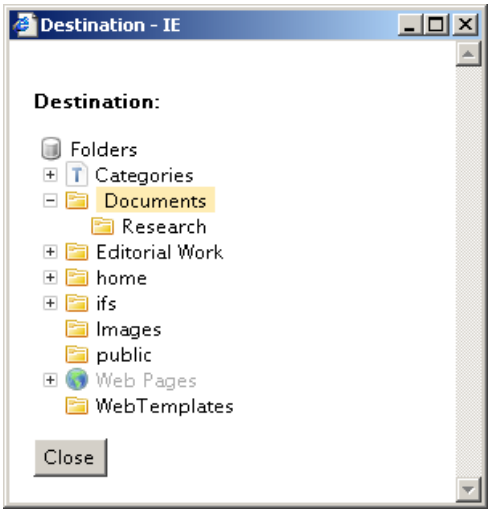


Figure 59: Selecting the Second Folder

6. Click on the name of the second folder (here: `Web Pages`).

   The selected entry is entered in the second folder with equal rights.

Caution: The entry is maintained with equal rights in both the original and the new folder; **no** copy is created! This could possibly confuse inexperienced users. For example, after you delete the entry in one of the two folders, it remains intact in the remaining folder – and appears simultaneously in the wastebasket.

Note: You should only use this function in exceptional cases since it makes intuitive working in the system more difficult.

Note: Using the properties dialog, you can determine all storage locations of an entry (see Section 3.3.3).

3.5.21 Adapting the Metadata Configuration

Only a system administrator can configure meta-attributes!

The site-specific meta-attributes (see Section 3.3.6) are typically defined when the system is first set up. Modifications during productive operation are only appropriate in exceptional cases and can only be carried out by the system administrator.

The figure in the following instructions shows the sample metadata of inxire ECM (see Appendix 10.4):

1. Log in as system administrator (`system`).
2. Open the editorial view (see Section 2.4).
3. Using the main navigation, call `Admin > Metadata Administration`.

   The metadata administration opens:

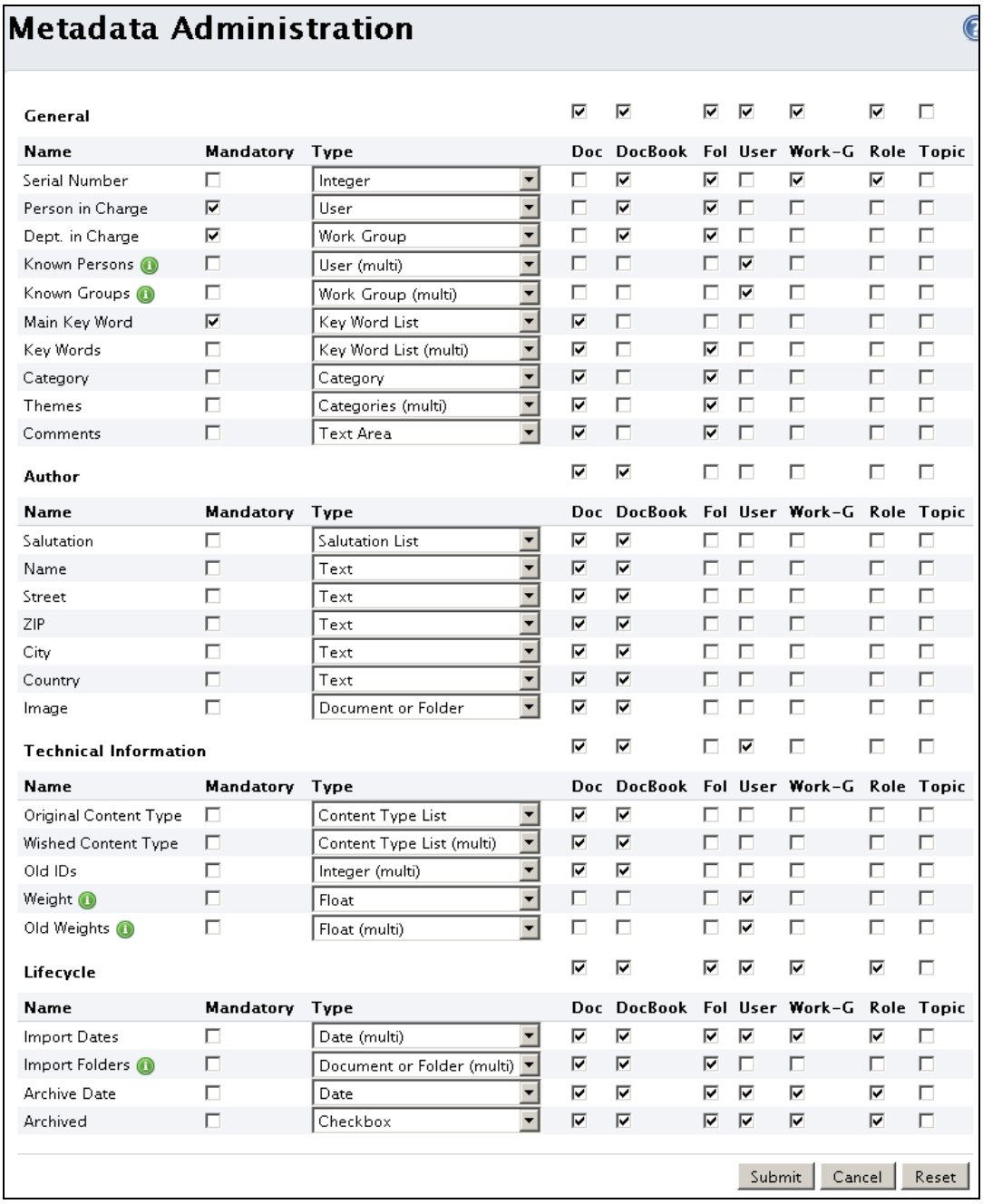


Figure 60: Metadata Administration

The first column displays the name of the meta-attribute in the current user language. The attributes are grouped by topic (`General`, `Author`, etc.).

In the second column the mandatory fields are flagged.

The dropdown menu in the third column enables you to change the data type.

Caution: You should only change existing data types in exceptional cases because, otherwise, all data set for documents and folders, etc. becomes invalid!

The last seven columns assign the meta-attributes to the object types (document, Web article, folder, user, work group, role and topic).

4. Carry out the changes.
5. Confirm the dialog with `Submit`.

Note: For more information on metadata configuration, see "Administration Manual inxire ECM".

Caution: Meta-attributes are defined specifically for each customer. The attributes displayed are purely sample data!

3.5.22 Releasing Locks

Only a system administrator can release locks.

In various system components, locks are used to synchronize editing steps:

- Workflow management enables you to reserve processes for autonomous editing (see Figure 155).
- Versioned documents must be reserved before editing (see Section 3.5.5).
- In the course of a process, entries are also reserved for editing (revision mode, see Section 3.2.5).

In all cases, locks are set which prevent editing by other users. These locks can be released by the user who initially made the reservation. The required functions are `Edit > Cancel Process Reservation` or `Cancel Reservation`.

A system administrator can also call these functions acting as a substitute.

In special circumstances, for example, if an employee has left the company, the system administrator may be faced with the task of releasing multiple locks. In this case the function `Release Locks` is very useful. This can process entire folder hierarchies:

1. Log in as system administrator (`system`).
2. Open the Folders (see Section 3.1).
3. In the navigation tree on the left, select the folder where the locked document or start folder is located.
4. Activate the `List` or `Symbols` tab on the right and flag the document or the folder with a check mark.

   You must select one entry only.
5. Then choose menu option `Tools > Release Locks`.

   The following screen opens:

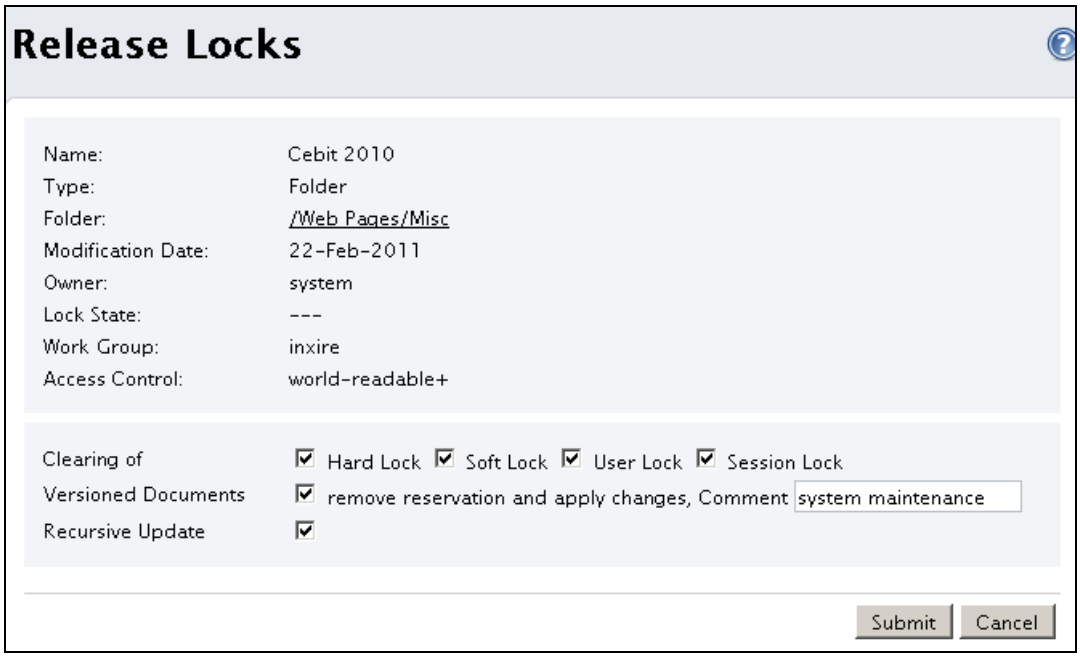


Figure 61: Releasing Locks in Directory "/Web Pages/Misc/Cebit 2010"

In the upper part of the screen, the selected entry is described (here, the folder `/Web Pages/Misc/Cebit 2010`). The line (`Lock State`) displays any existing lock (empty here).

6. Flag the required options.

   Different types of locks can be released:

   - **Hard Lock:** This lock prohibits any editing.
   - **Soft Lock:** Prevents editing but allows deletion of the entry.
   - **User Lock:** Allows editing only by the user who reserved the entry.
   - **Session Lock:** Locks the entry for the duration of a user session.
   - **Versioned Documents:** Reservation of a versioned document. The comment to be entered serves as a version comment for the new version when the changes are accepted (see Section 3.5.5).

   Note: The standard version of inxire ECM uses only soft locks, user locks and locks on versioned documents.

   The option `Recursive Update` is only available for folders. If you flag a check box here, locks are removed from all contents of the folder and its subfolders. In the example above, there is no lock visible for the folder but documents and subfolders within it may be locked.

7. Confirm the dialog with `Submit`.

   The selected entry and optionally any folder contents and subfolder contents are unlocked.

Note: Using this function, you can release process locks but you cannot end the process itself. To do this, go to the work list (see Section 8.3) and call the action `Cancel Process`.

Note: The system administrator can view locks in the properties dialog (`Security` screen, see Section 3.3.5).

4 Web Content Management

4.1 Introduction

Web Content Management covers the maintenance of the portal contents using the editorial view. All the portal articles and images, and also the navigation elements, exist as documents or folders in the content repository (see Chapter 3). In the following sections we explain how you can use the editing functions in the Folders to create new portal pages or to adapt existing pages as required.

Editing should occur as part of a controlled process: The publication process (see Section 4.1.5). This means improved logging and revision support, and also the avoidance of errors thanks to dual control.

Note: The use of special functionalities such as wiki, forum etc. is not described here but in Chapter 5 "Modules and Active Elements".

4.1.1 What Can I Find in the Folders?

The start page of the portal corresponds to the folder "Web Pages". The name may differ in your installation but you can recognize this special folder easily by the blue globe .

The contents of this folder and its subfolders form the pages of the portal.

Here you can find:

- Web articles – structured texts with tables, lists, images etc.,
- Images – as part of an image gallery or an article,
- Documents – in various formats for downloading,
- Folders – for the navigation structure in the portal frame and
- Wikis, forums, online surveys or other special objects with unique functionalities (see Chapter 5).

4.1.2 Web Articles

Text contents of the portal are stored in a structured format in accordance with the DocBook standard (references in Appendix 10.6.3). Advantages of this open and widely used standard include media-independent data management (see Section 4.1.6) and numerous tools for conversion into common output formats such as HTML or PDF.

Documents in DocBook format are called "Web articles" here or simply "articles". You can recognize them in the Folders by the content type `DocBook Article` and the file suffix `xdoc`.

They are edited in an interactive editor (see Section 4.3). Similar to common text processing programs, you can insert tables, lists and images.

You can easily create a test Web article by switching to the private folders (see Section 3.1.1) and choosing menu option `File > New… > Article`. After you enter a file name and select a template, the article editor opens (see Section 4.3). The final article is not yet visible in the portal but by clicking on the DocBook icon , you can open a realistic single view.

Note: Article templates can be found in the templates folder (see Section 3.1.1). They are created with the template editor when the system is set up and they define the outline structure of the article (see Section 4.2).

4.1.3 Folders

Folders represent the navigation structure of the portal (see Section 2.1):

- The start page corresponds to the folder "Web Pages" (the actual name may vary).
- Its subfolders define the categories of the main navigation.
- Subfolders at lower levels appear in the vertical navigation menu on the left.
- Only those folders are visible that have been published for the current language setting (see below).

When you navigate to one of these folders in the portal, the portal page is structured according to the following rules:

1. Article List / Image Gallery

   By default, all published articles and images in the folder are listed. First come all the articles in their short form (title, figure in title, and abstract), then all images in small format (image gallery).

2. Intro Article

   If the folder contains an intro article, this appears before the list. An intro article is a Web article whose name begins with `intro_`.

3. Index Article

   If an index article exists (name begins with `index_`), only this article is displayed. The article list, image gallery and intro article do not appear.

4. Downloads

   All other documents in the folder are provided for download on the right of the page.

5. Published?

   Only published articles, images and documents are visible (see below).

These rules apply for normal folders. Special objects such as wikis or forums are subject to other rules (see Chapter 5). Here too, you can (almost always) create an intro article.

Note: The navigation menus, article lists, and image galleries are sorted alphabetically by default. However, you can change this sequence by setting a `Priority` (see Section 3.3.3). Entries with a priority appear first, smaller values before greater.

4.1.4 Published?

Or: Where Is My Article?

The entries of the Folders do not appear automatically in the portal. You must actively publish each individual article and each folder. On publication, you define for which period and for which languages the article or folder is to be visible.

You can choose not to publish individual entries, for example, the images of an article, or a folder that is not to be visible in the navigation menu. We will return to this topic later.

First, we look in detail at the conditions for visibility of objects in the portal.

4.1.4.1 Publication Period

The publication period begins with the publication date and ends with the expiration date. If no expiration date is set, the publication period is valid indefinitely.

You can set both dates in the properties dialog (tab page `General`, see Section 3.3.3). In the lists of the editorial view, you can recognize published entries by the note (published).

4.1.4.2 Titles and Languages

For which language does the publication apply?

In the portal, it is not the name of a folder or document that is displayed but its title. This is a translated designation in the current user language. Therefore, an article or folder in the portal is only visible for those languages for which a title is set.

You edit the titles in the properties dialog (tab page `General`, see Section 3.3.3). Here you can find a separate entry field for each supported language (English and German in most cases).

The titles provide you with very flexible multilingual control. You can decide, for example, if a folder (which is a navigation node) is to be visible in all languages or only in one.

Note: When you edit articles in the article editor, the heading is automatically placed in the appropriate title field. You only need the properties dialog here if you wish to make an English article accessible to German users, for example. In this case you set an additional German title.

Example: Suppose a folder has the following properties:

- Name: "latest"
- English title: "News"
- German title: "Aktuelles"

In the portal, English-speaking users see the navigation node "News", German users see "Aktuelles". In the editorial view, only the name "latest" is displayed. Here you can see that it is not always easy to match the entries in the Folders to the correct pages in the portal.

For this reason, you should ensure that the name and titles are as similar as possible.

Note: The name of an entry also determines the URL of a portal page. Since users may have set bookmarks for this URL, you should not change the name after publication. You can adapt the title if required.

4.1.4.3 Exceptions

The exception proves the rule. Documents or folders that are linked directly are visible even if they are not published. These are:

- the images in an article
- the targets of links (hyperlinks)

Images that appear only as elements of an article are not to be published. These can even be located in a different area of the Folders, for example, in an image database.

The target of a link, be it an article or a folder, must not necessarily be published. You can decide this on a case-by-case basis. When you click on the link, the target is always displayed. However, if it is not published, it does not appear in any search result list or in a navigation menu or in any other listing.

4.1.5 Publication Process

The contents of the portal are visible to many users. Therefore, most systems are configured in such a way that only administrators have write privileges in the portal area.

Nevertheless, you can make changes quickly and easily: Work with the publication process (see Section 8.5).

This has many advantages:

- You work with a copy of the data and are, therefore, free to experiment.
- A preview simulates the final status. Simply switch to the portal view or use the layout preview (tab page `Layout` in the file manager, see Section 3.2.3).
- While you are editing, you can undo individual changes or you can cancel the entire process.
- Your revisions are proofread by an editor and are only published after the editor approves them.

4.1.5.1 Starting a Process

You can start a publication process in two ways:

1. In the layout preview of the file manager. If you edit an entry here and you do not have write privileges, a publication process is started automatically.
2. Using the menu option `Edit > Apply for Update`. This is available in the list and symbols view of every folder in the portal area.

Note: If the menu option `Apply for Update` is deactivated or editing is not possible in the layout preview, the publication process has not been configured – or at least not for the current folder. Consult your system administrator.

4.1.5.2 Edit Contents

To edit existing entries in the Folders, you must first reserve them. Of course, you can also add new contents.

Apart from this, work in the publication process does not differ greatly from normal work within the Folders.

For further information and general explanations, see Chapter 8 "Workflow Management".

4.1.6 Media-Independent Data Management

The principal characteristic of a Web article (see Section 4.1.2) is the structure-oriented media-independent storage of the content. No direct information is stored for the presentation (layout) but only the semantic meaning of a text section.

For example, the title of an article is flagged as `<title>` and is stored without any other formatting information. It is, of course, later displayed in the appropriate size and format, for example, bold and separated from the text.

This information which is required for the presentation is inserted by an automatic process called the formatter according to the rules of a global style template[5]. For different output media, for example, HTML for the user interface or PDF for the print output, appropriate formatting rules can be defined.

The following graphic will illustrate this process:

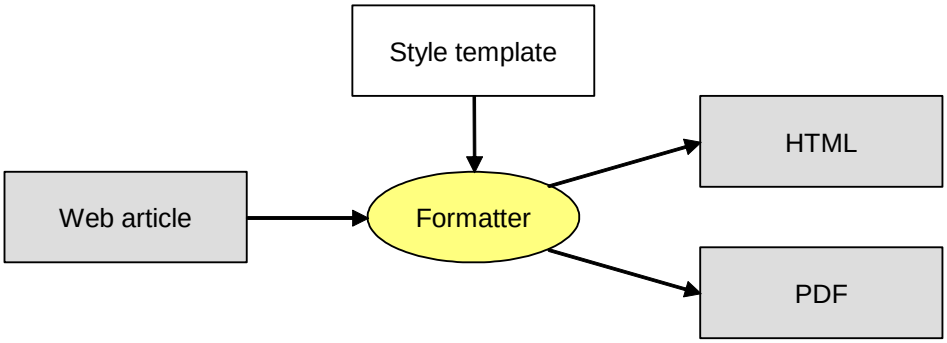


Figure 62: Presentation of Media-Independent Contents

The advantages of media-independent storage are:

- Generation of different target formats in high quality (HTML, PDF, etc.)
- Uniform appearance of all articles (corporate identity).
- It is easy to make changes to the style templates even after the articles have been created.
- Authors do not require knowledge of programming or HTML.
- Web design of the articles becomes unnecessary or is used only once on creation of the global style templates.
- Therefore, the author can concentrate fully on the functional tasks.

The Web interface of inxire ECM combines the advantages of media-independent data management with an easy-to-use, graphical editorial system.

This is described in the next section.

4.1.7 Editorial System

The editorial system is entirely Web-based and consists of the following components:

- **Template Editor:** Screen for creation of article templates, establishment of the basic structure and definition of mandatory elements (see Section 4.2).
- **Article Editor:** Editor for creation and editing of Web articles (see Section 4.3)

[5] In inxire ECM, XSLT and CSS style templates are used for this.

- **WYSIWYG Editor:** A graphical editor which is embedded in the article editor. It is used for formatting text sections and offers numerous functional options (highlighting, images, tables, lists etc., see Section 4.4)
- **Compare Articles:** Here you can compare two or more versions of a Web article. You can also apply changes (see Section 4.5).
- **Link Checker:** The links between the articles are checked regularly for errors. Errors are shown on the screen "Broken Links" (see Section 4.6).

The following sections describe these tools in detail.

4.2 Template Editor

In the template editor, you can create or revise templates for Web articles (see Section 4.1.2). Creation of article templates is an important step when you initially set up the portal.

Templates are located in the `/WebTemplates` folder (the name can vary, see Section 3.1.1) or in one of its subfolders. They define the outline structure of the articles and contain little detail. For this reason, usually only one or two templates are required for each language.

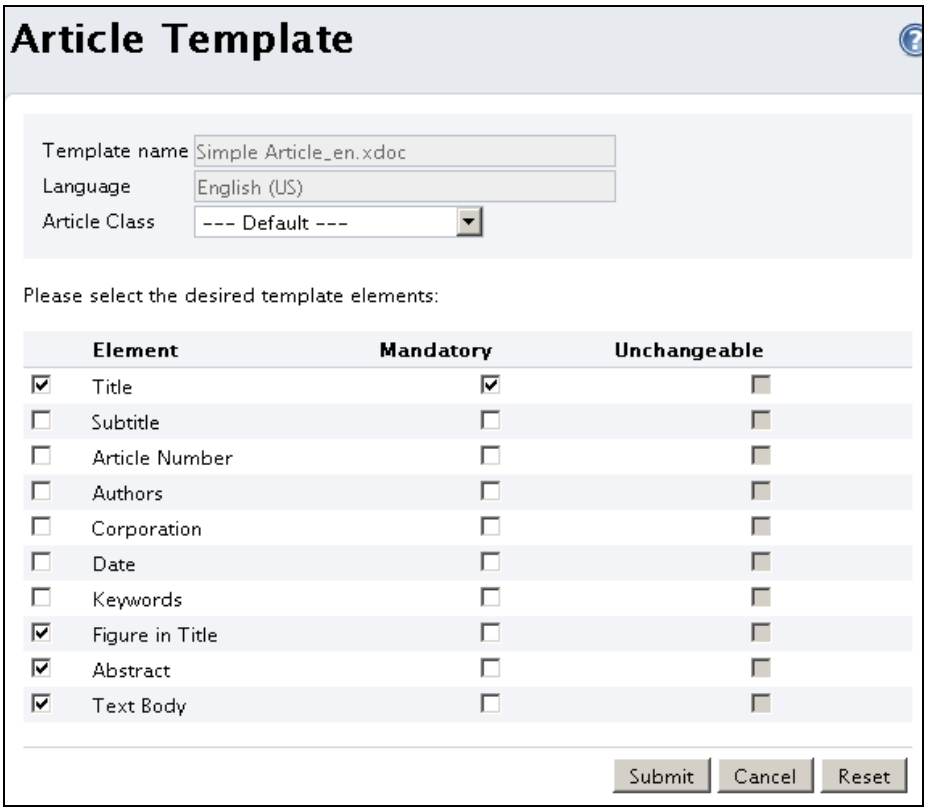


Figure 63: Template Editor.

To open an existing template, navigate to the templates folder, flag the required template and choose menu option `Tools > Template Administration`. To create a new template, call `File > New… > Article Template`.

For detailed instructions, see Sections 4.7.1 to 4.7.3.

4.2.1 Overview

On the top part of the screen there are entry fields for

- the name of the template,
- the language and
- an article class.

Below these, all available template elements are listed in a table. These include the title, subtitle and figure in title. By clicking on a check box, you can allow elements (first column), make them mandatory (`Mandatory`) or lock them against changes (`Unchangeable`).

Subsequently, authors can only use the template elements that have been selected. They must include mandatory elements, frequently the title image. They cannot edit locked elements such as the company name. The locked elements must already be filled with appropriate content in the template (see information below).

Using the button `Submit`, you confirm your entries and end the dialog. By choosing `Cancel`, you can exit the dialog without saving. With the button `Reset`, you delete all entries but remain on the screen.

4.2.2 Language

Each article template is linked to a specific language. In multilingual portals, therefore, you must create a separate template for each language.

You cannot change the language of existing templates.

4.2.3 Article Class

The article class defines the purpose of the template. In most cases it affects the display of the header and footer.

In many installations, a separate article class is only intended for the online help[6]. For this reason, you can usually leave the setting `Default`.

4.2.4 Template Elements

The table below describes the available template elements.

To copy a template element to the template, set a check mark in the first column. You should select at least the elements `Title` and `Text Body`.

4.2.4.1 Mandatory

You can make each template element mandatory. Just set a check mark in the column `Mandatory`.

[6] Additional article classes can be provided on customer request.

4.2.4.2 Unchangeable

If you flag the check box `Unchangeable` next to a template element, the author cannot change this element later. This is useful for the company name, for example.

Is the check box deactivated? Then you have not yet written any content in the template element. You must first save the template (button `Submit`) and edit it in the article editor (click on the name). There you can enter the company name, for example. Then you open the template editor again using the menu option `Tools > Template Administration`.

Element	Description	Content
Title	The heading of the article; this should always be present.	Text only
Subtitle	This appears directly below the heading.	Text only
Article Number	This is used to number articles that are in the same folder. In the portal, the articles are then displayed in order. This is especially relevant for articles that make up a logical unit, for example, the chapters of a book. The article number corresponds to the `Priority` in the properties dialog (see Section 3.3.3). If the article collection is distributed across multiple subfolders, the author can also specify the start folder for the article collection and thus create relative linking (seldom necessary).	Integer
Authors	Title, first and last name of the authors; these are displayed by default under the title line (this can vary).	Text only; split into multiple fields
Corporation	The name of the company or the organization	Text only
Date	The publication date (bibliography)	Text only

Element	Description	Content
Keywords	A free text field for keywording. The author can enter multiple words separated by a comma. Depending on the storage area, a topic tree may be available as an entry help (see topic search, Section 3.2.3.2). This field belongs to the metadata. If a topic tree exists, links to the topics are shown in the portal (`Read More…`). Hits in the keyword list are ranked higher when searching than hits in the article content (score).	List of terms
Figure in Title	An image right beside or above the title; a miniature version is shown in lists and overviews.	Single image
Abstract	A short summary of the content; this appears in all portal lists and overviews and should be meaningful.	Simple text passage without images, tables and lists
Text Body	The actual content of the article	Structured text with sections, images, tables bulleted lists, etc.

Table 7: Template Elements of a Web Article

4.3 Article Editor

In the article editor you can create and edit Web articles. Web articles (articles, for short) contain the text contents of the portal pages (see Section 4.1.2). Article templates can also be filled with content here (see Section 4.2).

To open an existing article, simply click on its name, for example, in the file manager (see Section 3.2). Alternatively you can use the menu options `Edit > Edit` or `File > Open`. You can create a new article with menu option `File > New… > Article`.

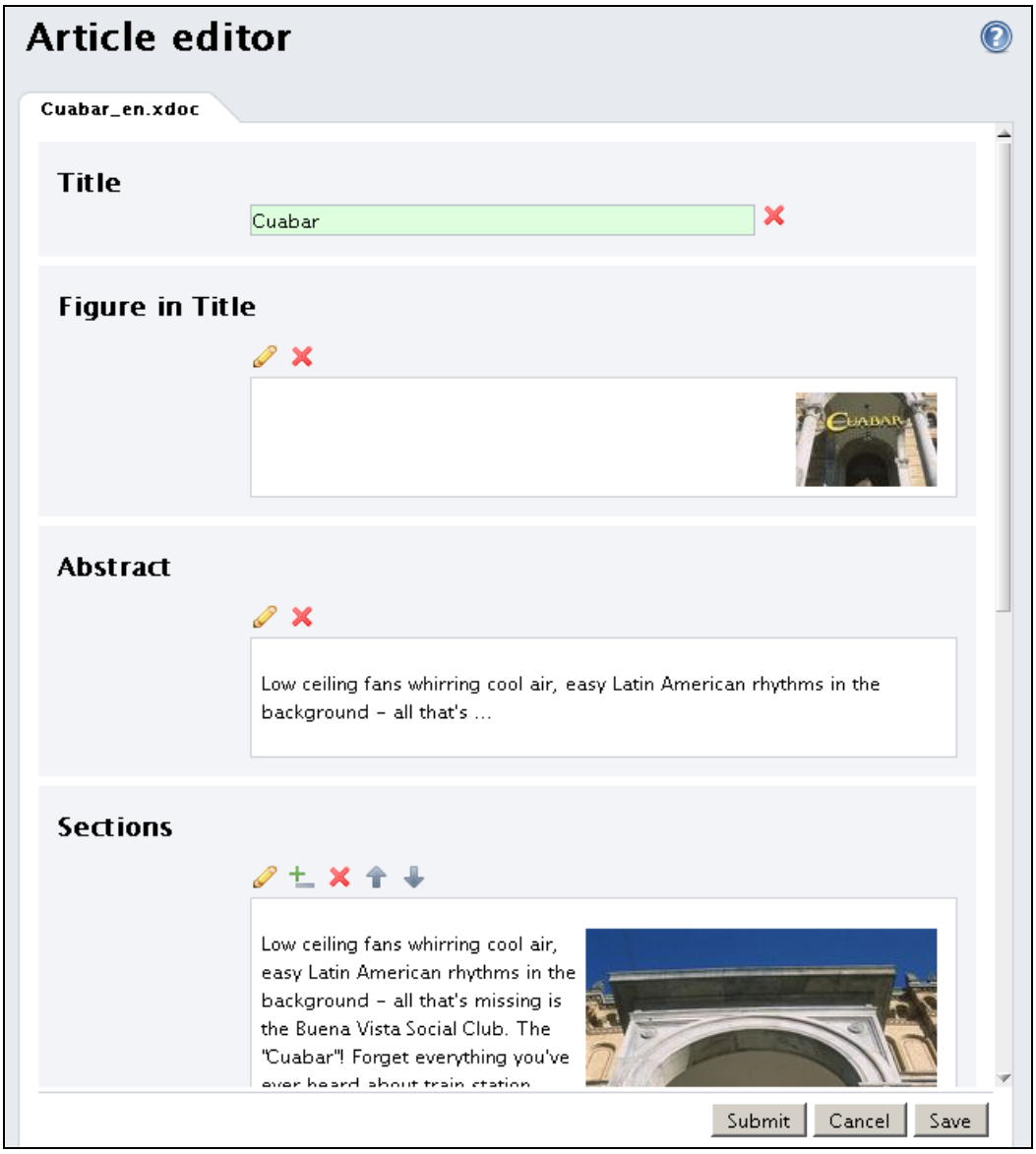

Article editor
Cuabar_en.xdoc
Title
Cuabar
Figure in Title
Abstract
Low ceiling fans whirring cool air, easy Latin American rhythms in the background – all that's ...
Sections
Low ceiling fans whirring cool air, easy Latin American rhythms in the background – all that's missing is the Buena Vista Social Club. The "Cuabar"! Forget everything you've
Submit
Cancel
Save

Figure 64: Article Editor

4.3.1 Overview

On the article editor screen you can see a list of entry fields one below the other; in the figure above, `Title`, `Figure in Title` and `Abstract`. At the end of the list, you can find the actual text content under `Sections`.

You will frequently see either more or less than the elements shown above. This is determined by the template. Each article is created on the basis of an article template and this specifies the possible elements. If, for example, the template does not allow a title image, then you cannot insert one.

The template can also lock elements so that you cannot edit them. Or it can make certain elements mandatory.

For a description of all the template elements and other information, see Section 4.2.4.

4.3.2 Editing Functions

Have a look at the icons next to the entry fields.

By clicking on the icon, you open a pop-up for editing. Text content and images, for example, are not edited directly but in the WYSIWYG editor (see Section 4.4).

The icons assist you to display or hide entry fields as required or to change their order. Changing the order of entry fields is especially useful with text sections.

Is any editing function missing or can you not hide a particular field? It has probably been locked in the template or been made mandatory (see Section 4.2.4).

The functions in detail:

Function	Description
(edit)	A pop-up opens for editing. For keywords, a topic tree is provided in some cases as an entry help (see Section 5.7). For the figure in title, the abstract and the text sections, the WYSIWYG editor opens (see Section 4.4).
(add)	A new entry field appears. Note: Some elements can only appear once, for example, the subtitle. Other elements such as authors or sections can be inserted as often as you wish.
(remove)	The entry field is deleted from the article. Note: You can insert it again later by clicking on (add).
(move up)	The entry field is moved up one position. Note: Only for elements that appear more than once such as authors and sections.
(move down)	The entry field is moved down one position.

Table 8: Editing Functions in the Article Editor

4.3.3 Submitting and Saving

Have you made changes? Do not forget to confirm your changes by submitting the screen. Otherwise the changes will be lost.

The button `Submit` is on the bottom right of the page (see Figure 64).

Using the button `Save`, you can save your work at any time without leaving the article editor.

4.3.4 Tips and Tricks

- If you do not need a particular template element, you should hide it (symbol ✖ remove). Otherwise you may not be able to save the article.

  For example, you must not leave the subtitle or the author's name empty. However, if the template permits, you can remove the entire entry field by clicking on ✖.

- To edit a section, simply click in the text.

  The WYSIWYG editor opens.

4.4 WYSIWYG Editor

The WYSIWYG editor helps to create formatted texts. WYSIWYG stands for "What You See Is What You Get" and shows the article as it will appear when published. This is in line with all common text processing programs. You can format texts interactively and insert images, lists and tables.

All the text contents of the portal are contained in Web articles (see Section 4.1.2). If you wish to edit an article, first call the article editor (see Section 4.3). Then you can open the individual text sections in the WYSIWYG editor. The title image and abstract are also edited here.

You can use the WYSIWYG editor in the same way when comparing articles (see Section 4.5).

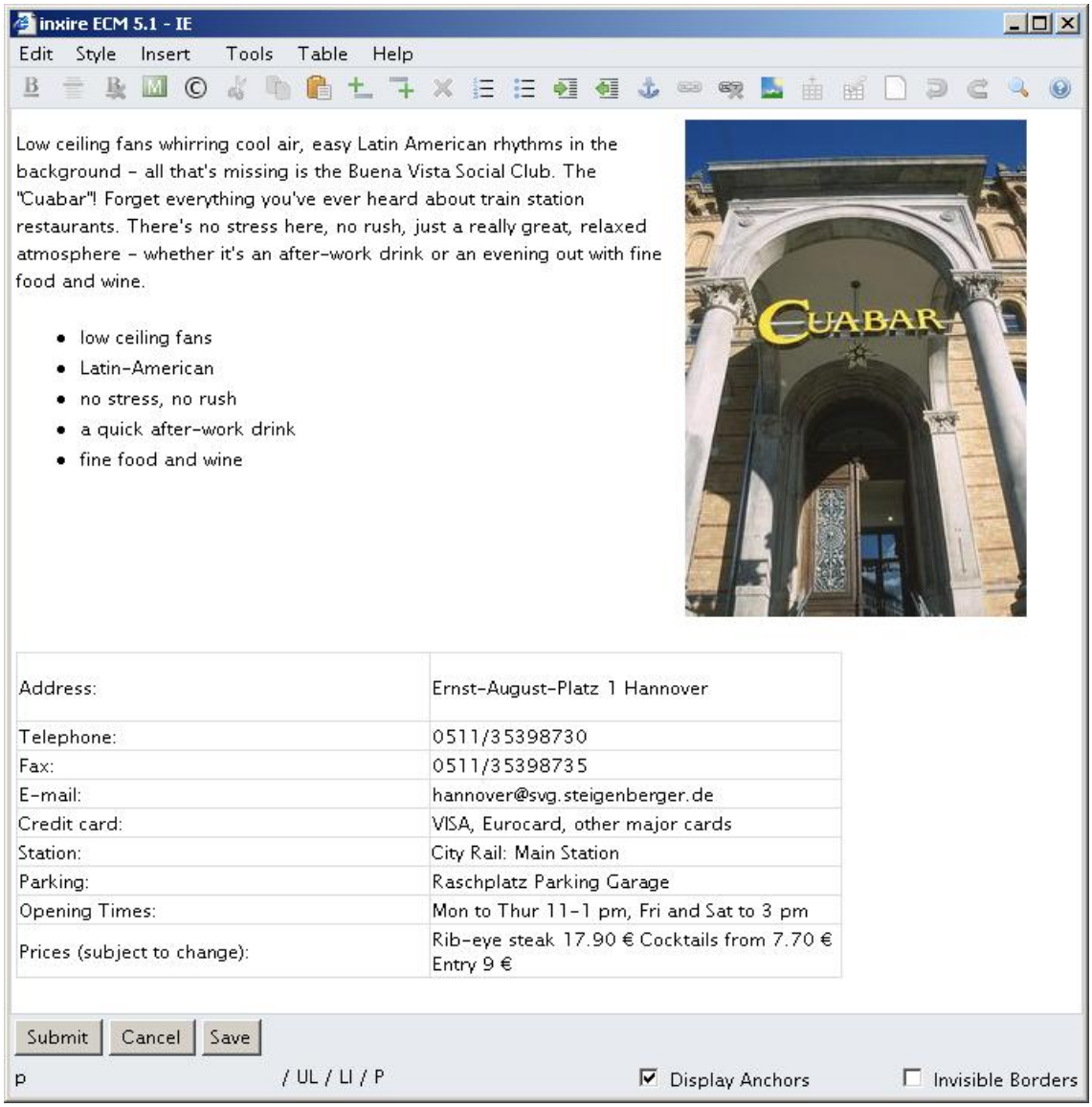

inxire ECM 5.1 - IE
Edit Style Insert Tools Table Help
Low ceiling fans whirring cool air, easy Latin American rhythms in the background – all that's missing is the Buena Vista Social Club. The "Cuabar"! Forget everything you've ever heard about train station restaurants. There's no stress here, no rush, just a really great, relaxed atmosphere – whether it's an after-work drink or an evening out with fine food and wine.
low ceiling fans
Latin-American
no stress, no rush
a quick after-work drink
fine food and wine
CUABAR
Address: Ernst-August-Platz 1 Hannover
Telephone: 0511/35398730
Fax: 0511/35398735
E-mail: hannover@svg.steigenberger.de
Credit card: VISA, Eurocard, other major cards
Station: City Rail: Main Station
Parking: Raschplatz Parking Garage
Opening Times: Mon to Thur 11-1 pm, Fri and Sat to 3 pm
Prices (subject to change): Rib-eye steak 17.90 € Cocktails from 7.70 € Entry 9 €
Submit Cancel Save
p / UL / LI / P
Display Anchors
Invisible Borders

Figure 65: WYSIWYG Editor

4.4.1 Overview

The WYSIWYG editor always opens in a separate browser window.

At the top of the page, you see the menu bar with the editing functions. For a detailed description, see Section 4.4.7. Under this is the toolbar which provides quick access to the most important functions. Only functions appropriate to the situation are active at any time.

Alternatively, you can use the context menu. This opens with a right mouse click in the content (under Windows, other operating systems may differ). Appropriate functions are shown for the element under the mouse pointer.

4.4.2 Cursor and Selections

The cursor indicates your current position in the content. You enter text with the keyboard here. Many editing functions refer to the cursor position, for example, `Insert Image` (see below).

You can position the cursor using the arrow keys on the keyboard or with a mouse click. The cursor disappears once you select a text block or an image.

To select a text block, hold down the left mouse key and drag the mouse simultaneously over the text. Or you can move the cursor with the arrow keys while holding down the shift key.

Double-click on a word to select it.

Select images and anchors with a single mouse click.

4.4.3 Editing the Figure in Title

If you have opened a figure in title in the WYSIWYG editor, you can only edit the image. You cannot enter text.

To select a different image, flag the image with the mouse and call the function `Tools > Image Properties`. The image editing dialog opens. Here you can define the width, height, caption (title) and other image properties.

The image editing dialog is described in detail in Section 4.4.8.5. There you can also find out how to create hyperlinks for individual parts of an image.

Alternatively, you can create a hyperlink to the whole image. Use the function `Insert Link` directly in the WYSIWYG editor.

4.4.4 Editing the Abstract

The formatting options for the abstract are limited. You cannot use images or bulleted lists here.

4.4.5 Submitting and Saving

Have you made changes? Do not forget to confirm your changes by submitting the screen.

The button `Submit` is on the bottom left of the page.

Caution: Initially, the changes are only effective in the article editor or `Compare Articles` screen. They are not saved permanently in the Folders until you submit the main screen!

To discard all changes and to close the WYSIWYG editor, use the button `Cancel`.

Using the button `Save`, you can save your work at any time without leaving the editor. The entire article – including the contents in the main window – is saved.

4.4.6 Tips and Tricks

- Drag & Drop

  You can drag contents from another application into the WYSIWYG editor: Select the text (for example, in Microsoft Word), press the left mouse key over the selection and, while holding down the mouse key, drag the text into the editor.

- Copy & Paste

  Alternatively, you can import the contents by copying and pasting. Select the text in the other application. Use Ctrl+C to copy it to the clipboard. Use Ctrl+V to insert it into the WYSIWYG editor.

  To export contents, use the procedure in reverse.

- After the contents are inserted, the formatting is adjusted automatically according to the portal standards. But be careful: You should check all copied hyperlinks manually and upload images separately into the Folders (see Section 3.5.2).

- The footer contains two check boxes `Display Anchors` and `Invisible Borders`. You can use these to display and hide anchors or table borders. Try it out!

4.4.7 Menu Elements of the WYSIWYG Editor

4.4.7.1 Edit Menu

Icon/ Label		Description	Only activated if
	Undo	Undo last change	Content was previously edited
	Redo	Redo change	Change was undone
	Cut	Cut contents and place in clipboard Keyboard shortcut: Ctrl+X	Text, image or table selected
	Copy	Copy content to clipboard Keyboard shortcut: Ctrl+C	Text, image or table selected

Icon/ Label		Description	Only activated if
	Paste	Insert from clipboard Keyboard shortcut: Ctrl+V	Clipboard filled
	Delete Selection	Delete selected text, image or table	Text, image or table selected
	Remove Link	Remove link	Cursor in a link
	Delete Metadata	Remove metadata placeholder	Cursor within a metadata placeholder
	Delete Paragraph	Delete complete paragraph	Cursor within a paragraph
	Delete All	Delete entire content(!)	
	Search	Search in content	

Table 9: "Edit" Menu in the WYSIWYG Editor

4.4.7.2 Style Menu

Icon/ Label		Description	Only activated if
	Title	Format paragraph as heading In the first paragraph a main heading is set, otherwise a second-level heading is set.	Cursor within a paragraph
	Default	Default style according to the "Corporate Design". This style should preferably be used.	Text selected
	italic	Set text in italics	Text selected
	underline	Underline the text	Text selected

Icon/ Label		Description	Only activated if
	...	Other style types may be available	Text selected
	Remove Format	Remove style or title selection	Cursor within highlighted text or heading

Table 10: "Style" Menu in the WYSIWYG Editor

Note: In the toolbar, you can set styles using the icon . An auxiliary dialog opens (see Figure 66).

4.4.7.3 Insert Menu

Icon/ Label		Description	Only activated if
	Insert text before	Insert empty paragraph before image, table or paragraph or insert space before metadata placeholder	Image selected or cursor within a table or paragraph or within a metadata placeholder
	Insert text after	Insert empty paragraph after image, table or paragraph or insert space after metadata placeholder	Image selected or cursor within a table or paragraph or within a metadata placeholder
	Insert Link	Insert or edit link. A help dialog opens (see Section 4.4.8.4)	Text or image selected or the cursor is in an existing link
	Insert Table	Create new table. A dialog opens (see Section 4.4.8.6)	Cursor within an empty paragraph
	Insert/Edit Image	Insert new image or edit existing one A dialog opens (see Section 4.4.8.5)	Cursor within an empty table cell or empty paragraph or an image selected

Icon/ Label		Description	Only activated if
	Metadata	Insert a placeholder for metadata. A dialog opens (see Section 4.4.8.2)	Cursor within a paragraph
	Insert special character	Insert special character. A dialog opens (see Section 4.4.8.3)	Cursor within a paragraph
	Anchor	Insert or edit anchor. The anchor is set at the beginning of the paragraph.	Cursor within a paragraph without an anchor or anchor selected
	Numbered List	Create numbered list or change format of numbered list. Note: With existing numbered lists, spacing and the numbering characters are changed alternatively.	Cursor within a paragraph, multiple paragraphs selected or cursor within numbered list
	Bulleted List	Convert paragraphs to bulleted list or change format of bulleted list. Note: With existing bulleted lists, the spacing is changed from narrow to wide.	Cursor within a paragraph, multiple paragraphs selected or cursor within bulleted list

Table 11: "Insert" Menu in the WYSIWYG Editor

4.4.7.4 Tools Menu

Icon/ Label		Description	Only activated if
	Image Properties	Edit image A dialog opens (see Section 4.4.8.5)	Image selected

Icon/ Label		Description	Only activated if
	Image Align Left	Align image to left of text	Image selected
	Image Align Right	Align image to right of text	Image selected
	Image Align Default	Align image between text blocks. Image is aligned to the right, to the left, or centrally depending on the global style template	Image selected
	Increase Nesting Level	Increase nesting of bulleted / numbered list	Cursor or selection within a bulleted / numbered list
	Decrease Nesting Level	Decrease nesting of bulleted / numbered list or remove bullets / numbering	Cursor or selection within a bulleted / numbered list
	Anchor	Edit anchor	Anchor selected

Table 12: "Tools" Menu in the WYSIWYG Editor

4.4.7.5 Table Menu

Icon/ Label		Description	Only activated if
	Edit Table	Edit table. A dialog opens (see Section 4.4.8.7)	Cursor within a table or parts of a table selected
	Insert row above	Insert new row above	Cursor in a table cell
	Insert row below	Insert new row below	Cursor in a table cell
	Insert column right	Insert new column to the right	Cursor in a table cell
	Insert column left	Insert new column to the left	Cursor in a table cell

Icon/ Label		Description	Only activated if
	Merge Columns	Merge the current cell with the cell to the right	Cursor in a table cell
	Merge Rows	Merge the current cell with the cell below	Cursor in a table cell
	Divide Columns	Split cell to the right again	Cursor in merged cell
	Divide Rows	Split lower cell again	Cursor in merged cell
	Remove Row	Remove row	Cursor in a table cell, not in header or footer
	Remove column	Remove Column	Cursor in a table cell
	Remove Table	Delete complete table(!)	Cursor in table or parts of a table selected
	Align Table Cell Default[7]	Align cell content according to the global style template	Cursor in table or multiple cells selected
	Align Table Cell Left[7]	Align cell contents to the left	Cursor in table or multiple cells selected
	Align Table Cell Center[7]	Align cell contents in center	Cursor in table or multiple cells selected
	Align Table Cell Right[7]	Align cell contents to the right	Cursor in table or multiple cells selected

Table 13: "Table" Menu in the WYSIWYG Editor

[7] Only available in the context menu.

4.4.7.6 Help Menu

Icon/ Label		Description	Only activated if
	Context Help	Calling context help for the WYSIWYG editor	

Table 14: "Help" Menu in the WYSIWYG Editor

4.4.8 Auxiliary Dialogs in the WYSIWYG Editor

Various functions of the WYSIWYG editor open an auxiliary dialog. The following sections describe these in detail.

4.4.8.1 Emphasis Dialog

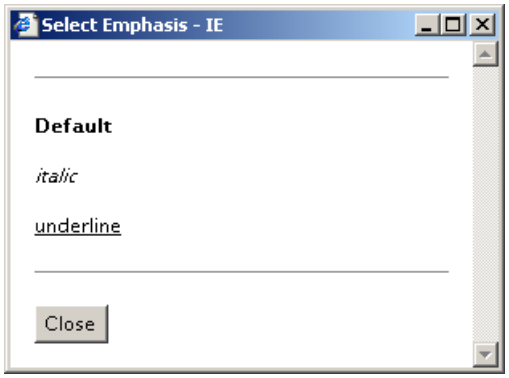


Figure 66: "Select Emphasis" Dialog

You access this dialog using the symbol B (Style) in the toolbar. Before calling it, you must select a text block. The list of styles available can differ from that in the figure above depending on the configuration of the system.

You select the required style by clicking on the label. You should preferably use the default style (`Default`) since this corresponds to the "Corporate Design" (see Section 4.1.6) and is adjusted automatically if the corporate style is changed.

4.4.8.2 Metadata Dialog

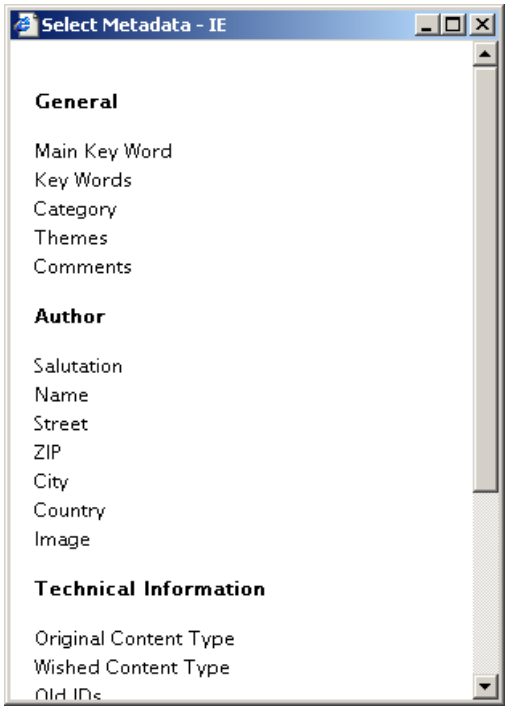


Figure 67: "Select Metadata" Dialog

You use this dialog to place a metadata placeholder in the current text. You call it up using the symbol or menu option `Insert > Metadata`.

The dialog displays the list of configured meta-attributes. To insert a placeholder in the text, click on a meta-attribute. The placeholder is later replaced by the current value of the meta-attribute when the article is displayed.

Note: The figure shows the sample metadata (see Appendix 10.4). The current configuration can differ significantly.

4.4.8.3 Special Character Dialog

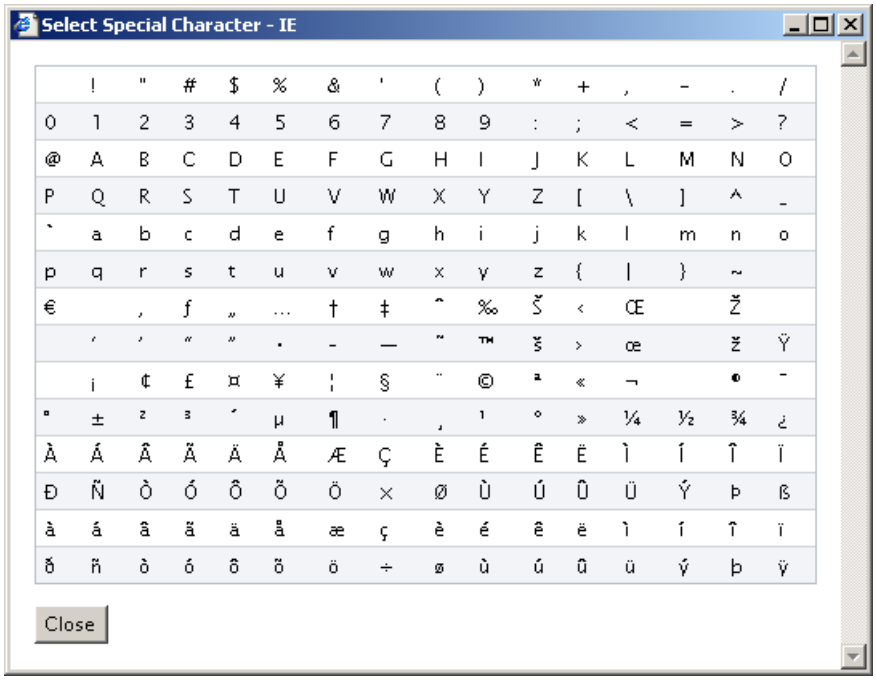


Figure 68: "Select Special Character" Dialog

In this dialog, all available characters are displayed. The list is especially useful for special characters which are difficult to find using the keyboard.

You can open the dialog using the symbol © or the menu option `Insert > Insert special character`. To insert a character in the text, you simply click on it.

4.4.8.4 Insert / Edit Link Dialog

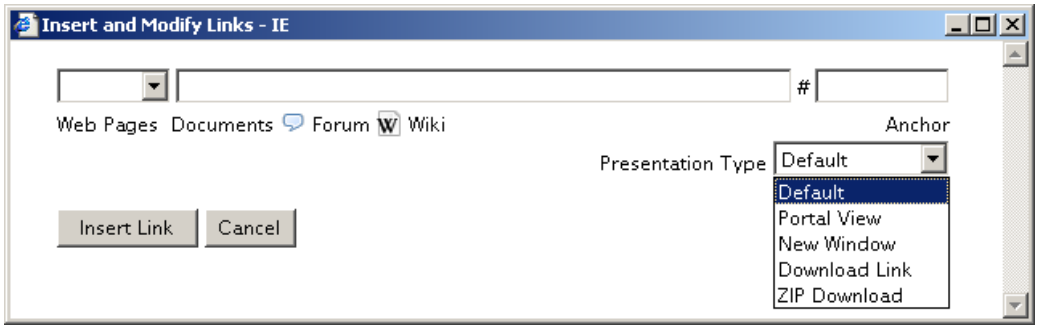


Figure 69: "Insert and Modify Links" Dialog

Using this dialog, you can create and edit hyperlinks. You call it up using the symbol or menu option `Insert > Insert Link`. You must first select a text block or an image or place the cursor in an existing link.

If the link target is in an external internet portal, you can enter the complete Web address (URL) in the central entry field. The URL is automatically split into its components protocol (left dropdown menu), server path (central field) and anchor (right, optional).

If the target is local, use one of the functions `Web Pages`, `Documents`, `Forum` or `Wiki`. An auxiliary dialog opens with the hierarchy of the portal pages, the complete contents of the Folders or a search screen for forum posts or wiki articles. To find the appropriate target, you may have to open closed folders (information in Section 2.4.2.4) or submit a search query (see Section 9.5). To make a selection, click on the name.

Note: The options `Forum` and `Wiki` are not available in every installation.

As a third option, you can insert a cross-reference to an anchor in the current article. First delete the content of the central field and then click on the function `Anchor`. A selection window opens with all available anchors. If you click on one of the anchors, it is entered in the entry field on the right.

Use the dropdown menu on the bottom right to define how the target is displayed. If you leave the setting `Default`, Web articles and folders are opened in the same window (`Portal View`) whereas other documents such as PDF documents are opened in a new browser window.

4.4.8.5 Insert / Edit Image Dialog

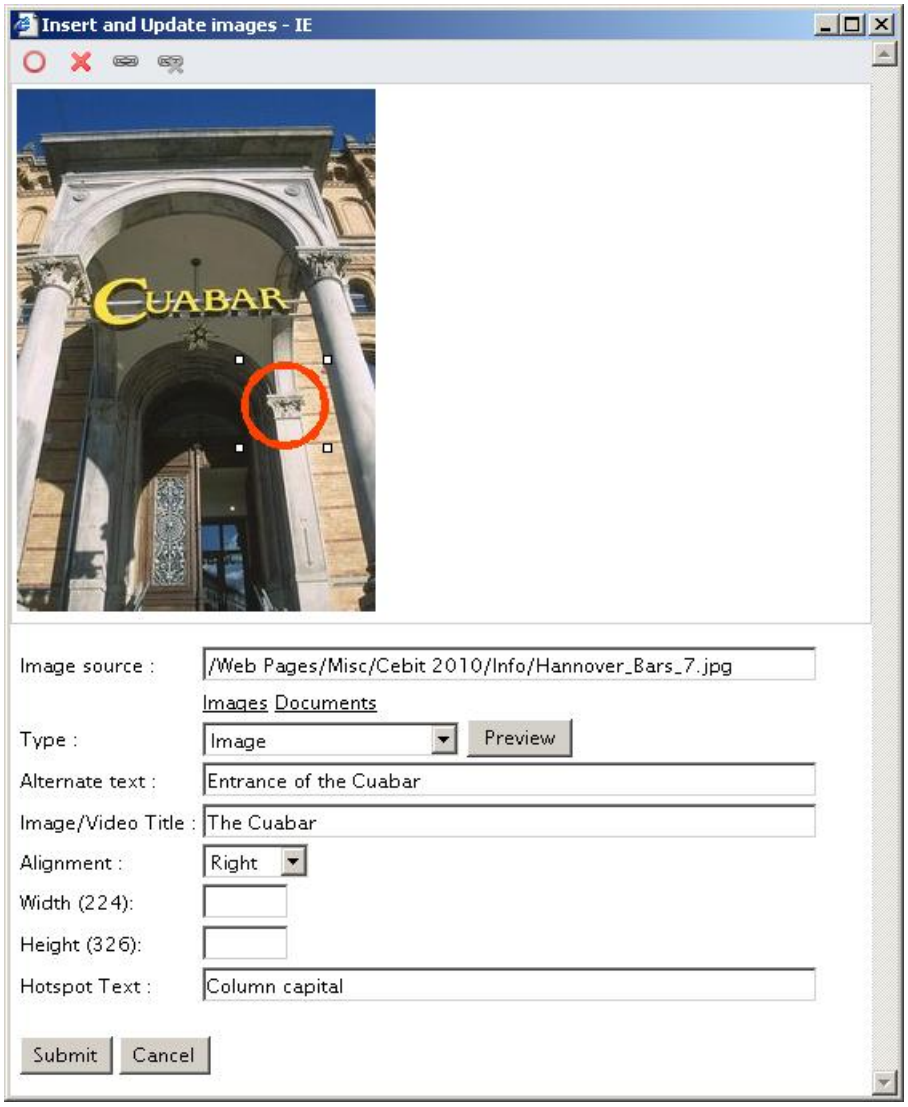


Figure 70: "Insert and Update Images" Dialog

This dialog enables you to select and format an image. You can also define active image areas (hotspots, see red circle) and create links for these. It is also possible to integrate a video in place of an image (flash, other formats on request).

If the image or video is located externally, in an external internet portal, you must enter the Web address (URL) into field `Image Source` directly. For videos or special image formats which the browser does not natively support, you must also set the appropriate format under `Type`, for example, `Macromedia Flash (swf)`. Then choose the button `Preview` to test how it works.

For local images, you should preferably use the functions `Images` or `Documents`. An auxiliary dialog opens with the image database or the entire Folders (see Chapter 3).

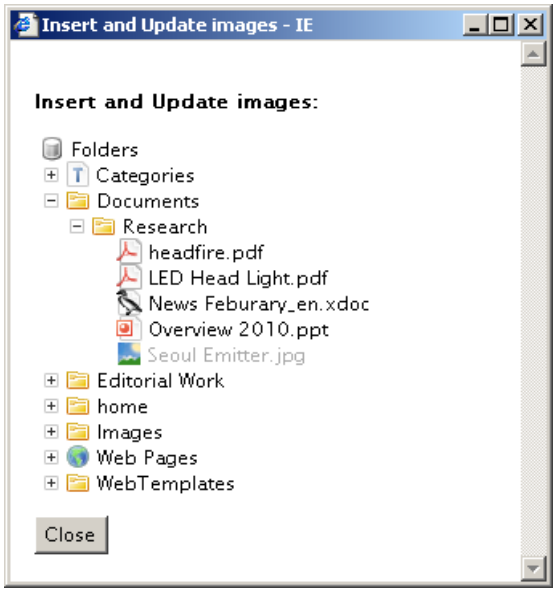


Figure 71: Dialog for Image Selection (Documents)

You can open closed folders by clicking on the plus sign. You select the image by clicking on the name (here `Seoul Emitter.jpg`). A preview appears automatically in the image-editing dialog. All common image and video formats are supported.

The dialog does not close immediately but enables selection of an alternative image. Once you have found the required image, you can close the dialog using the button `Close`.

Once the image has been determined, you should enter an alternative text for non-visual browsers (important for accessible applications) and in some cases enter a title for the image (field `Image/Video Title`). This title is displayed as an info text in the default configuration whenever the user positions the mouse cursor over the image.

Other details are optional.

The toolbar at the top (see Figure 70) enables you to set hotspots. These are active image areas which contain a link similar to a link in text (in the example, the red circle around the column capital on the right). Using the symbol , you insert a new hotspot. If you click on the hotspot with the mouse, you can move it or change its size. A click on the icon opens the dialog "Insert and Modify Links" so that you can edit the link (see Figure 69). A click on the symbol removes the link, a click on the complete hotspot.

For accessibility, it is important that an alternative text is stored for hotspots too. You select the hotspot (click on it with the mouse) and enter the text in the field `Hotspot Text` (at the bottom). This text is visible for visual users when they move the mouse cursor over the active area. For this reason, hotspots can also be used for labeling image areas – even without links.

4.4.8.6 *Insert Table Dialog*

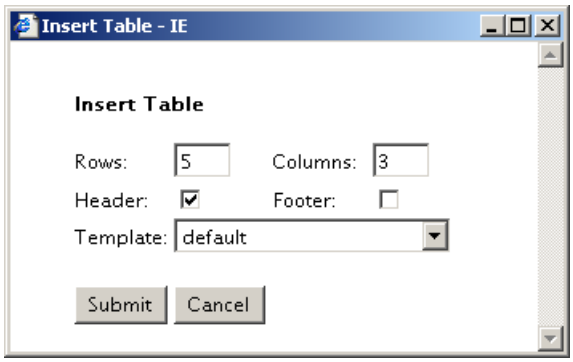


Figure 72: "Insert Table" Dialog

This dialog provides support when you create tables. To call it, place the cursor in an empty paragraph and choose symbol or menu option `Insert > Insert Table`.

Enter the number of rows and columns required. Optionally, you can insert a header or footer or select a different table template. After you choose `Submit` the table is created.

You can make subsequent adjustments at any time.

4.4.8.7 *Edit Table Dialog*

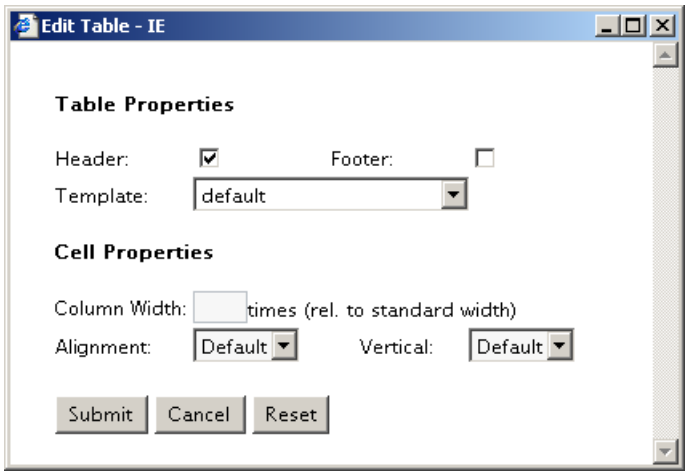


Figure 73: "Edit Table" Dialog

In this dialog, you can modify the properties of a table or table cell. To call it, either place the cursor in a table cell or select parts of the table. Then choose symbol or menu option `Table > Edit Table`.

You can insert or remove headers and footers or modify the table template. The settings on the lower part of the screen refer to the cell, in which the cursor is located, or to the cells that are selected.

Confirm your entries with `Submit`.

4.5 Compare Articles

The article comparison enables you to compare two or more versions of a Web article. This can be useful in the publication process (see Section 8.5), for example, if several users edit copies of an article in parallel and the author then wishes to consolidate these changes in the final article.

In the article comparison, you can not only view the changes other users have made but you can also accept them individually by clicking on them. You can also manually re-edit using the WYSIWYG editor.

To call the compare article function, choose the menu option `Tools > Compare Articles`.

Note: This functionality is not available in every installation.

Night Life 01 (All marked changes with respect to Night Life)
Bars Rather Than Bits and Bytes
Bars rather than bits and bytes: From the casual lounge to the traditional brewery - top tips for Hannover's night life.
Not only during Cebit: You've been on your feet all day in the huge crowds. You're hungry, thirsty and tired - you've earned something nice.
Cuabar
Low ciling ceiling fans whirring the cool air, easy Latin American rhythms in the background - all that's ...mehr
Ernst August Brewery
This brewery is an institution in Hannover. It still brews its own Hannöversch beer - by hand. It's brewed in accordance with the strict ...mehr
Compare Articles
Working Space
Reference Article
Base Article
Night Life
Bars Rather Than Bits and Bytes
Bars rather than bits and bytes: From the casual lounge to the traditional brewery - top tips for Hannover's night life.
Not only during Cebit: You've been on your feet all day in the huge crowds. You're hungry, thirsty and tired - you've earned something nice.
Cuabar
Low ciling fans whirring the air, easy Latin American rhythms in the background - all that's ...mehr
Ernst August Brewery
This brewery is an institution in Hannover. It still brews its own Hannöversch beer - by hand. It's brewed in accordance with the strict ...mehr
Submit
Cancel
Save

Figure 74: Comparing Articles

4.5.1 Overview

Figure 74 shows the comparison of two articles. The screen is split into two areas.

On the right is the working area with the opened article. You can see the file name (`Night Life`) at the top (1); the file suffix and the language code are omitted for reasons of space. A click on the icon , opens the article in a separate browser window.

On the left (2) you can see the reference article (`Night Life 01`). Here also, a separate view opens if you click on the icon.

At the top right of the working area there is a menu bar. With the menu `Reference Article`, you can open a new reference article or display all opened reference articles at the same time (see Section 4.5.4.1).

The menu `Base Article` enables you to set the base article (3). This is initially identical to the opened article (1). You do not have to make any changes here unless you require multiple comparisons (see Section 4.5.3).

Differences between the articles are highlighted in color (4-8). With a mouse click, you can accept individual changes (reference article) or undo them (working area). Try it out.

You access the functions for manual re-editing using the context menu (see Section 4.5.4.3). This opens with a right mouse click in the content (under Windows, other operating systems may differ).

Do not forget to confirm your changes by choosing the `Submit` button.

Note: The numbers in parentheses refer to the figure.

4.5.2 Change Indicators

The meaning of the colors:

- **Red:** Text or image was deleted (4, 5).
- **Green:** Text or image was added (8).
- **Yellow:** Hidden change. For example, a hyperlink may have been changed (6).

You can see more information if you hold the mouse pointer over the colored item. A short text appears with the date and type of change.

Note: Comments and text sections that you have edited manually are also highlighted in yellow.

In Figure 74 you can see the following changes:

(4) This paragraph is missing in version `Night Life 01`.

(5) Here a typing error has been corrected. Text changes are displayed as a combination of deleting (red) and inserting (green).

(6) The link was changed. Most browsers show the new link in the status bar.

(7) This image was deleted. As with text changes, the old image is flagged as deleted and the new one as inserted.

(8) Here a word has been changed.

4.5.3 Multiple Comparisons

As long as you are only comparing two versions of an article, the comparison is easy and can be handled intuitively.

It becomes more complicated in the following case:

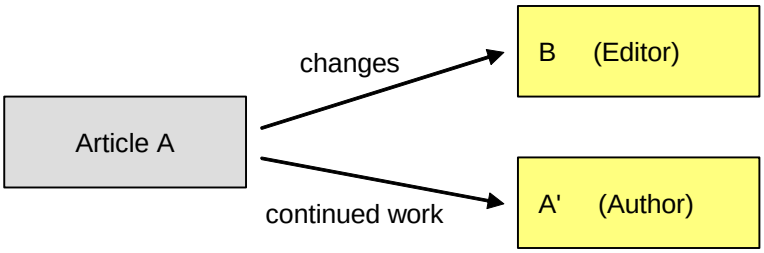


Figure 75: Scenario for Multiple Comparison

- An author has created article A and forwarded it as a copy to an editor. The editor makes changes and sends it back. This is version B.
- In the meantime, the author has continued work on the article. This is now a new version A'.

The author can simply compare version A' with version B from the editor. Let us suppose, version B from the editor contains an extra paragraph. What has happened? Did the author delete it or has it been inserted by the editor?

A simple comparison is not sufficient to clarify this question. We have to look at the common basis for both versions: the original article A.

If the author specifies article A (provided a copy still exists) using menu option `Base Article > Open Other Base Article` the changes are assigned correctly:

- The author's changes appear in the working area.
- The editor's changes are displayed in the reference article.

Note: Using menu option `Reference Article > Open Other Reference`, you can open additional reference articles for example, if other users besides the editor have worked on it.

For detailed instructions on multiple comparisons, see Section 4.7.7.

4.5.4 Menu Elements

4.5.4.1 Reference Article Menu

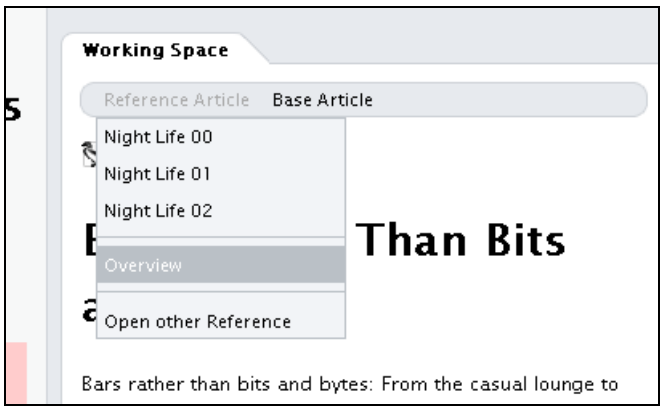


Figure 76: "Reference Article" Menu

The `Reference Article` menu enables you to select an alternative reference document. It is made up of three areas:

- In the upper part of the screen, the reference articles that are currently opened are shown (here `Night Life 00`, `Night Life 01`, `Night Life 02`). By clicking on a name, you open a single comparison with this version.
- Menu option `Overview` accesses the multiple comparison. The reference articles are displayed one above the other (see Figure 87).
- You can include a further document in the list using menu option `Open Other Reference`. An auxiliary dialog opens (similar to Figure 71). Click on the name of the required article there.

4.5.4.2 Base Article Menu

Figure 77: "Base Article" Menu

You can modify the base article using the menu `Base Article`. The menu is split into two areas.

- In the upper part, the base articles used to date are listed (`Night Life`, `Night Life 00`). By clicking on the name, you set up the comparison screen for this article again.

  Note: When you open the article comparison, the current working version is initially entered as the base document (here: `Night Life`).

- The menu option `Open Other Base Article` enables you to select an additional document. An auxiliary dialog opens (similar to Figure 71) where you can select the new base article. Click on the name of the required article there.

Note: All flagged changes refer to the base article. However, the base article itself is not shown.

Note: As a rule, you should use either the current working version or the oldest version as the base article.

4.5.4.3 Context Menu

Figure 78: Context Menu in the Working Area

The manual editing functions are concealed in the context menu. You open this with a right mouse click in the text content (under Windows, other operating systems may differ).

In the working area, you can:

- `Center Windows`

  This function aligns the reference article and the working area at the same text block.

- `Edit Text/Image`

  An editing window opens. The title and simple metadata fields are opened in a small text window, formatted sections are opened in the WYSIWYG editor (see Section 4.4).

  Note: After editing, the text block or image is displayed in yellow.

- `Insert Remark`

  You can insert a remark in the text. This is saved with your user ID. It can only be seen in the article editor and article comparison, not in the portal.

- `Delete Remark`

  The remark under the mouse pointer is deleted.

Note: The context menu also opens over the reference article. Here, however, only the function `Center Windows` is available.

Note: Only functions that are appropriate for the mouse position are available.

4.6 Link Checker

With editorial work in the portal, it sometimes happens that articles or folders will be deleted or moved even though other articles still link to them. If a user then clicks on a link, the following error message appears: "Page not found".

In order to detect these errors, the inxire ECM editorial system automatically manages all links. Every time the article editor is called, or more exactly, every time an article is saved, the links are extracted from the content and saved as a note with the article (see Section 3.4.3).

In addition to links, information on embedded images is also stored here.

These links are checked regularly. Some errors, such as renamed or moved targets, are recognized and corrected by the system. You will have to correct others manually. That is the purpose of the screen "Broken Links".

Note: As an option, error reports can be sent by e-mail to the owners of the articles. Consult your system administrator.

4.6.1 Broken Links Screen

You can access the `Broken Links` screen by way of the main menu of the editorial view using `Admin > Broken Links`.

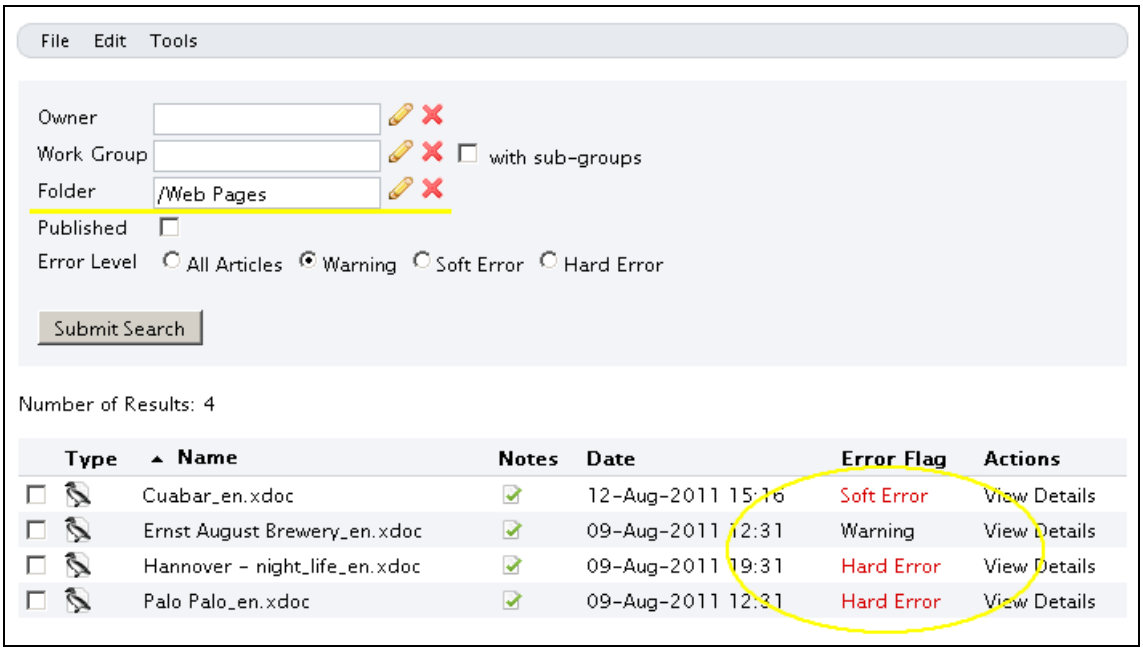


Figure 79: "Broken Links" Screen

4.6.1.1 Overview

At the top of the screen, you see the menu bar with the editing functions (see Section 4.6.1.3).

Under this there are various filter and search options (note in next section).

Then follows a table containing the faulty articles. You can sort the list by clicking on a table heading.

For each article, in addition to the regular attributes such as `Name` and `Type` (see file manager, Section 3.2.3.1), the error flag is also displayed. Right next to this, in the `Actions` column, you can see the link `View Details`. This opens a detailed list of all the broken links (see Section 4.6.1.5).

Using the editing functions, and with sufficient privileges, you can call the article editor to correct errors directly (menu option `File > Open`, `Edit > Edit` or the context menu). Alternatively, you can switch to the file manager by clicking on the article name. There you can use the layout preview (see Section 3.2.4.2) and the publication process (see Section 8.5).

4.6.1.2 Search and Filter

If you open the screen, you initially see only your own articles, that is, the articles for which you are entered as the owner.

Using the search functions at the top of the page, you can search for articles of other owners or work groups. Or you can specify a location in the Folders. The contents of the selected folder and all subfolders are searched.

The options in detail:

- `Owner`

  If you select another owner (click on the pencil), that owner's articles are displayed. Alternatively, you can delete the current entry (symbol) and use one of the following search options.

- `Work Group`

  Only articles assigned to the selected work group (see Section 6.1.1) are displayed.

  By clicking on the pencil, you open a selection dialog.

- `Folder`

  Select a folder from the content repository (click on the pencil). The contents of this and all subfolders are searched.

- `Published`

  This filter restricts the display to published articles (see Section 4.1.4).

- `Error Level`

  Only articles with the selected error level or higher are displayed.

  If you also wish to view articles without errors, choose `All Articles`.

Each time you change the search options, you must manually update the article list (button `Submit Search`).

Note: You can only ever see the articles for which you have a read privilege (see Section 7.2.2).

4.6.1.3 Editing Functions

The menu bar at the top of the page provides numerous editing functions from the File, Edit and Tools menus (see Appendix 10.3).

Before you call these, you must flag an article with a check mark.

Alternatively, by clicking on the article name, you can switch to the file manager and make changes there, for example, uploading a new image.

Are the menu options grayed out? Then you most likely do not have access privileges (see Section 7.1) and you must first start a publication process (see Section 4.1.5).

4.6.1.4 *Error Levels*

The importance of the error is displayed in the column `Error Flag`:

- `Warning`

  Not all users who have read privileges for the article can also access the target of the link. This can be due to missing access privileges (`ACL Conflict`) or a publication period (`Pub. Date Conflict`) which is too short.

- `Soft Error`

  The target of the link has been renamed or moved. As a rule, this error is corrected automatically.

- `Hard Error`

  The target has been deleted. You must restore the target, select a different target (in the article editor) or remove the link from the article.

You can see a list of the broken links with the exact cause of the errors in the detail view (see next section).

4.6.1.5 *View Details*

Using the link `View Details` in the actions column, you can obtain further information (see Section 3.5.18):

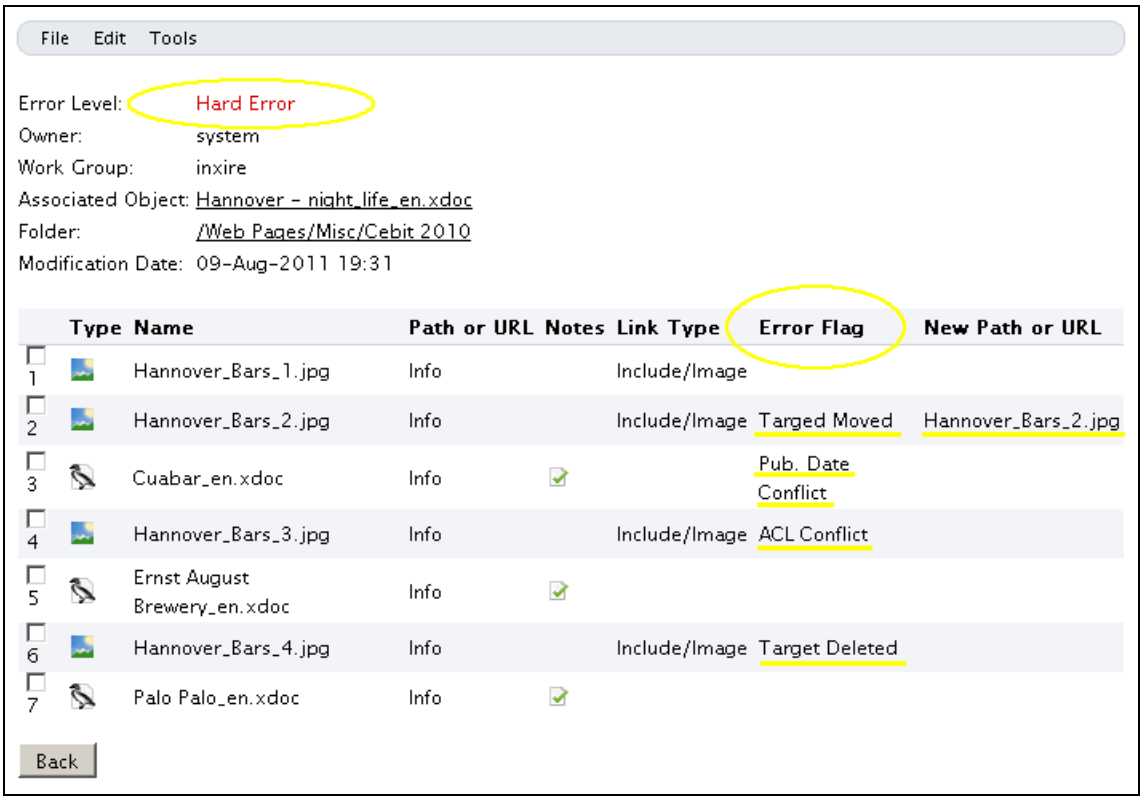

File Edit Tools
Error Level: Hard Error
Owner: system
Work Group: inxire
Associated Object: Hannover - night_life_en.xdoc
Folder: /Web Pages/Misc/Cebit 2010
Modification Date: 09-Aug-2011 19:31
Type Name Path or URL Notes Link Type Error Flag New Path or URL
1 Hannover_Bars_1.jpg Info Include/Image
2 Hannover_Bars_2.jpg Info Include/Image Targed Moved Hannover_Bars_2.jpg
3 Cuabar_en.xdoc Info Pub. Date Conflict
4 Hannover_Bars_3.jpg Info Include/Image ACL Conflict
5 Ernst August Brewery_en.xdoc Info
6 Hannover_Bars_4.jpg Info Include/Image Target Deleted
7 Palo Palo_en.xdoc Info
Back

Figure 80: Links of a Faulty Article

The list contains all targets that are linked to in the article. Broken relations are entered in the column `Error Flag`.

The column `Link Type` (in the center) displays whether it is an include of the article, that is, an image or a video object or a link (empty field). The column `Path or URL` specifies the URL in the case of links to external websites, and the (relative) path in the case of internal links. In the example, all links refer to the subfolder `Info`.

The column `Error Flag` describes the importance of the error. The sum of the individual errors determines the overall evaluation which is shown at the top of the page as the `Error Level` (here: `Hard Error`, see Figure 79).

The error flags in detail:

Error Flag	Error Level	Description
ACL Conflict	Warning	Not all users who have read privileges for the article can also access the target of the link. **Action:** Check the access privileges (see Section 3.5.17)
Pub. Date Conflict (publication date conflict)	Warning	The target is only published for a short period of time. **Action:** Harmonize the publication periods (see Section 4.1.4.1)
Target Moved	Soft Error	The target was moved to a different directory or it was renamed. As a rule, this error is corrected automatically. **Action:** Open the article in the editor and save it or choose menu option `Tools > Rescan Article`
Target Deleted	Hard Error	The target document has been deleted from the system. **Action:** Restore the target, select a different target or remove the link.

Table 15: Error Flags for Links

Note: You can apply menu options to target documents by selecting the required target and then selecting an option in the menu bar (at the top in Figure 80). Alternatively, you can access numerous functions quickly and easily using the context menu (right mouse key under Windows, other operating systems may differ).

Note: By clicking on the path (here: `Info`), you open the file manager.

4.7 Typical Tasks

You can quickly and intuitively carry out many tasks in the maintenance of portal contents using the menu bar in the file manager (see Section 3.2.4.1). As an alternative for simple editing steps, you can use the layout preview (see Section 3.2.4.2).

The following instructions describe some of the tasks in detail:

- Section 4.7.1: Creating a Template
- Section 4.7.2: Filling a Template with Content
- Section 4.7.3: Modifying a Template
- Section 4.7.4: Creating an Article
- Section 4.7.5: Editing an Article
- Section 4.7.6: Comparing Two Articles
- Section 4.7.7: Comparing Multiple Articles
- Section 4.7.8: Analyzing Links

4.7.1 Creating a Template

Templates define the outline structure of Web articles (see Section 4.2).

The following instructions describe how you can create a new template. You must have the add-item privilege (see Section 7.2.2) for the template folder (`/WebTemplates`) or the required subfolder:

1. Open the Folders (see Section 3.1).
2. In the navigation tree on the left, select the template folder (`/WebTemplates` or similar name) or a subfolder.
3. Activate the `List` or `Symbols` tab on the right and choose menu option `File > New… > Article Template`.

   The template editor opens.

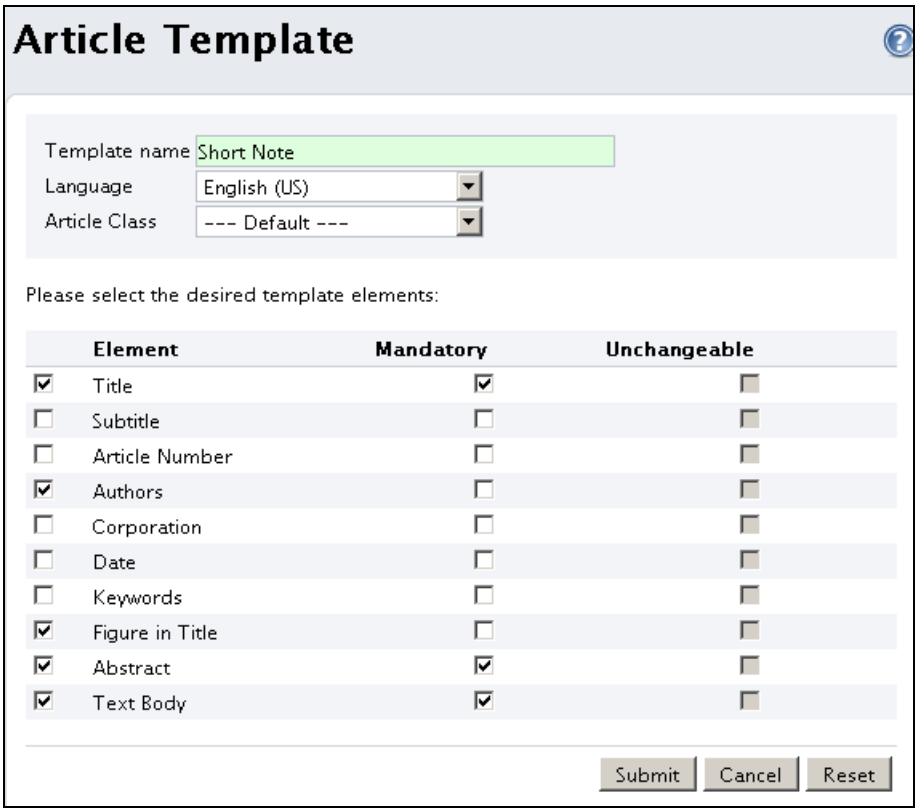


Figure 81: Creating an Article Template

4. Enter the following information:

   a. `Template Name`

   b. `Language` (article templates are tied to a specific language)

   c. `Article Class` (optional, see Section 4.2.3)

5. Select the required template elements (see Section 4.2.4).

   A check mark in the first column enables the element for the template. Subsequently, authors can only use these elements. Select at least the `Title` and `Text Body`.

   If you place a check mark in the column `Mandatory` the element becomes mandatory.

   Note: The check boxes in the column `Unchangeable` are initially deactivated. You must first save the template (button `Submit`), open it in the article editor (click on the name) and then fill it with content (see Section 4.7.2). Then you open the template editor again using menu option `Tools > Template Administration` (see Section 4.7.3).

6. Confirm the dialog with `Submit`.

The template is created and can be used immediately.

You can call up the template editor again at any time using menu option `Tools > Template Administration` (see Section 4.7.3).

4.7.2 Filling a Template with Content

You can prefill templates with contents in the article editor:

1. Open the Folders (see Section 3.1).
2. In the navigation tree on the left, select the template folder (`/WebTemplates` or similar name) or the subfolder where the template is located.
3. Activate the `List` or `Symbols` tab on the right.
4. Click on the name of the template.

   Alternatively: Flag the template with a check mark and choose menu option `File > Open` or `Edit > Edit`.

   The article editor opens (see Figure 64).
5. Insert the content.

   You can prefill the template elements with content (see Section 4.2.4), for example, you can select a standard title image or create a general text arrangement in the text body.

   For a description of how the article editor works, see Section 4.3.

   Note: To prevent subsequent editing of the template elements in the article, you must open the template in the template editor (next section) and place a check mark at `Unchangeable`.
6. Confirm the dialog with `Submit`.

The new contents are now included in the article template.

4.7.3 Modifying a Template

You can modify the settings of an existing template in the template editor (see Section 4.2) at any time.

1. Open the Folders (see Section 3.1).
2. In the navigation tree on the left, select the template folder (`/WebTemplates` or similar name) or the subfolder where the template is located.
3. Activate the `List` or `Symbols` tab on the right.
4. Flag the required template with a check mark and choose menu option `Tools > Template Administration`.

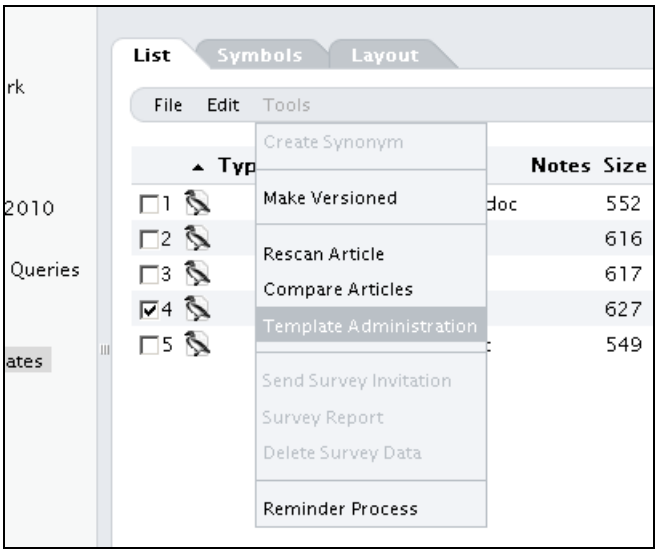


Figure 82: Menu Option "Template Administration"

The template editor opens (see Figure 64).

5. Modify the template.

   You can add template elements or remove existing ones, and you can define mandatory elements and flag prefilled elements as `Unchangeable`.

   The functions of the template editor are described in Section 4.2.

6. Confirm the dialog with `Submit`.

The changes are now included in the article template.

4.7.4 Creating an Article

You create Web articles in the article editor (see Section 4.3):

1. Open the Folders (see Section 3.1).
2. In the navigation tree on the left, select the folder in which the entry is to be created.
3. Activate the `List` or `Symbols` tab on the right and choose menu option `File > New… > Article`.

   The dialog "New Article" opens.

4. Enter a file name:

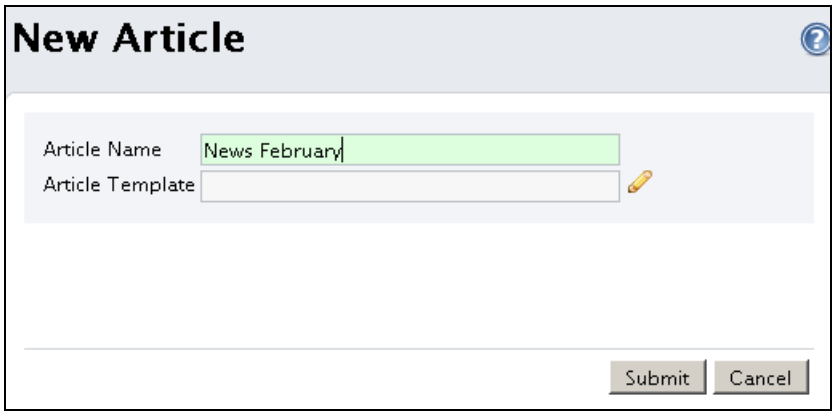


Figure 83: "New Article" Dialog

5. By clicking on the pencil , you open the selection dialog for the template:

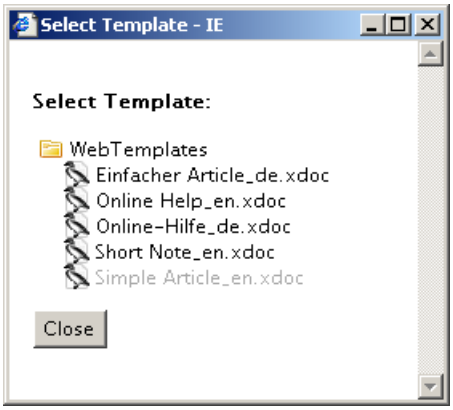


Figure 84: Selecting a Template

6. Select a template (click on the name).

   The selection dialog is closed and the template is entered in the field `Article Template`.

7. Exit the dialog "New Article" with the button `Submit`.

   The article editor opens (see Figure 64).

8. Enter the contents in the article editor.

   You can fill in the title and simple text fields directly, you edit formatted text sections and images in the WYSIWYG editor (see Section 4.4).

   For more information on the use of the article editor, see Section 4.3.

9. Confirm your entries with `Submit`.

   Caution: Remember to submit not only the WYSIWYG editor but also the article editor when you are finished. Otherwise your entries will be lost!

The new Web article is created.

4.7.5 Editing an Article

To revise Web articles, you open the article editor:

1. Open the Folders (see Section 3.1).
2. In the navigation tree on the left, select the folder where the article is located.
3. Activate the `List` or `Symbols` tab on the right.
4. Click on the name of the article.

   Alternatively: Flag the article with a check mark and choose menu option `File > Open` or `Edit > Edit`.

   The article editor opens (see Figure 64).
5. Revise the content.

   You can change the title and simple text fields directly, you edit formatted text sections and images in the WYSIWYG editor (see Section 4.4).

   For more information on the use of the article editor, see Section 4.3.
6. Confirm your entries with `Submit`.

   Caution: Remember to submit not only the WYSIWYG editor but also the article editor when you are finished. Otherwise your entries will be lost!

The article is updated.

4.7.6 Comparing Two Articles

With inxire ECM, you can compare two or more Web articles and copy differences from one version into the other (see Section 4.5). Here, the comparison of two articles is described. Section 4.7.7 describes the comparison of multiple articles.

Take the following scenario:

- You are an author and you have created an article (`Night Life_en.xdoc`). You have forwarded a copy (`Night Life 01_en.xdoc`) to an editor.
- The editor has made some changes and corrections.
- The editor returns the copy to you and you wish to selectively work some of the proposed changes into your working version (`Night Life_en.xdoc`).

You can do this quickly and easily using the `Compare Articles` function:

1. Open the Folders (see Section 3.1).
2. In the navigation tree on the left, select the folder in which the working version (`Night Life_en.xdoc`) is located.
3. Activate the `List` or `Symbols` tab on the right.
4. Flag the working version with a check mark and choose menu option `Tools > Compare Articles`.

   A selection dialog opens for the reference article:

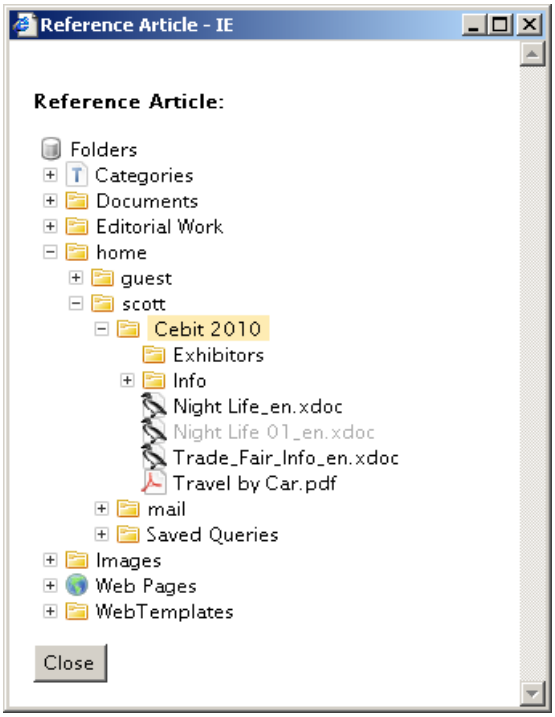


Figure 85: Selecting a Reference Article

5. Click on the name of the required reference article (here `Night Life 01_en.xoc`).

   The article comparison is started (see Figure 74).

6. Accept whatever changes you wish.

   With a mouse click, you can accept changes (reference article) or undo them again (working area).

   Using the context menu, you can manually re-edit in the WYSIWYG editor (right mouse key under Windows, other operating systems may differ).

   For detailed information on the use of the `Compare Articles` function, see Section 4.5.

7. Finally, confirm the dialog with `Submit`.

Note: If you have not made any changes, you can exit the article comparison with `Cancel`.

The working version is updated.

4.7.7 Comparing Multiple Articles

The article comparison allows you to simultaneously open multiple reference articles and to select a specific base article (see Section 4.5).

The following scenario will illustrate this:

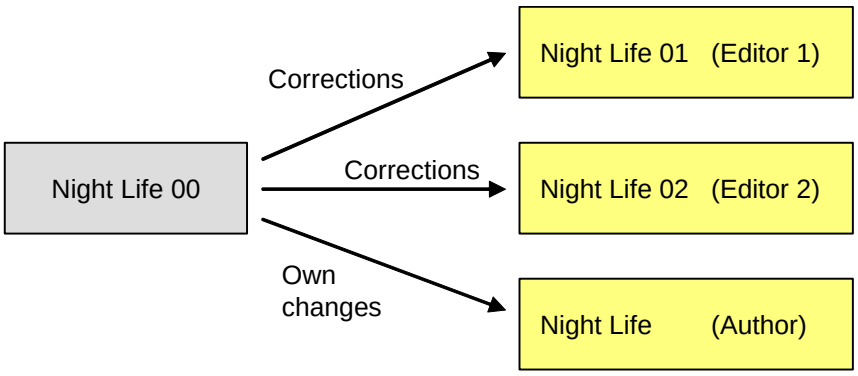


Figure 86: Comparing Three Articles

- You are an author and you have created an article (`Night Life_en.xdoc`). You have forwarded two copies (`Night Life 01_en.xdoc` and `Night Life 02_en.xdoc`) to different editors.
- Both editors have made some changes and corrections.
- In the meantime, you have made some changes of your own and you have saved the original version under the name `Night Life 00_en.xdoc`.
- The editors return the copies to you and you wish to work some of the proposed changes into your working version (`Night Life_en.xdoc`).

The necessary steps in detail:

1. Open the Folders (see Section 3.1).
2. In the navigation tree on the left, select the folder in which the working version (`Night Life_en.xdoc`) is located.
3. Activate the `List` or `Symbols` tab on the right.
4. Flag the working version with a check mark and choose menu option `Tools > Compare Articles`.

   A selection dialog opens for the reference article (see Figure 85).
5. Click on the name of the first reference article (`Night Life 01_en.xoc`).

   The article comparison is started.

6. Choose menu option `Reference Article > Open Other Reference`.

   The selection dialog for the reference article is opened again. Now select the second reference article (`Night Life 02_en.xdoc`).

   Note: First the single comparison is displayed.

7. Open the multiple comparison using menu option `Reference Article > Overview`:

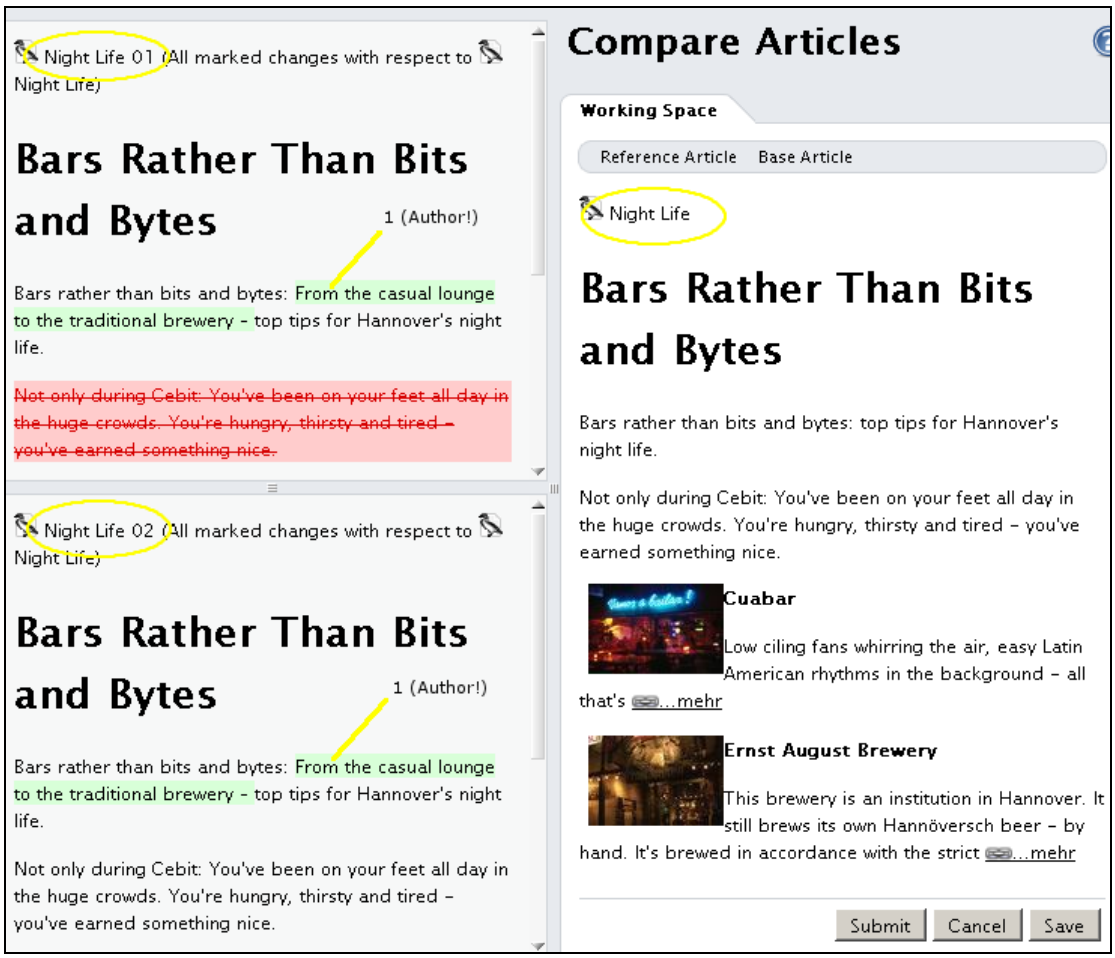

Night Life 01 (All marked changes with respect to Night Life)
Bars Rather Than Bits and Bytes
1 (Author!)
Bars rather than bits and bytes: From the casual lounge to the traditional brewery - top tips for Hannover's night life.
Not only during Cebit: You've been on your feet all day in the huge crowds. You're hungry, thirsty and tired – you've earned something nice.
Night Life 02 (All marked changes with respect to Night Life)
Bars Rather Than Bits and Bytes
1 (Author!)
Bars rather than bits and bytes: From the casual lounge to the traditional brewery - top tips for Hannover's night life.
Not only during Cebit: You've been on your feet all day in the huge crowds. You're hungry, thirsty and tired – you've earned something nice.
Compare Articles
Working Space
Reference Article
Base Article
Night Life
Bars Rather Than Bits and Bytes
Bars rather than bits and bytes: top tips for Hannover's night life.
Not only during Cebit: You've been on your feet all day in the huge crowds. You're hungry, thirsty and tired – you've earned something nice.
Cuabar
Low ciling fans whirring the air, easy Latin American rhythms in the background – all that's ...mehr
Ernst August Brewery
This brewery is an institution in Hannover. It still brews its own Hannöversch beer – by hand. It's brewed in accordance with the strict ...mehr
Submit
Cancel
Save

Figure 87: Multiple Comparison Before Selection of Base Article

The two reference articles are displayed on the left, the working version on the right.

Note that in the figure the change (1) is indicated incorrectly. This is a change by the author and not by the editor! The reason for this error is the incorrect selection of the base article, which we shall now put right.

8. Select the correct base article:

   a. Choose menu option `Base Article > Open Other Base Article`.

      The selection dialog for the base article opens (similar to Figure 85)

   b. Click on the name of the original version (`Night Life 00_en.xdoc`).

   The change (1) is now correctly assigned to the author:

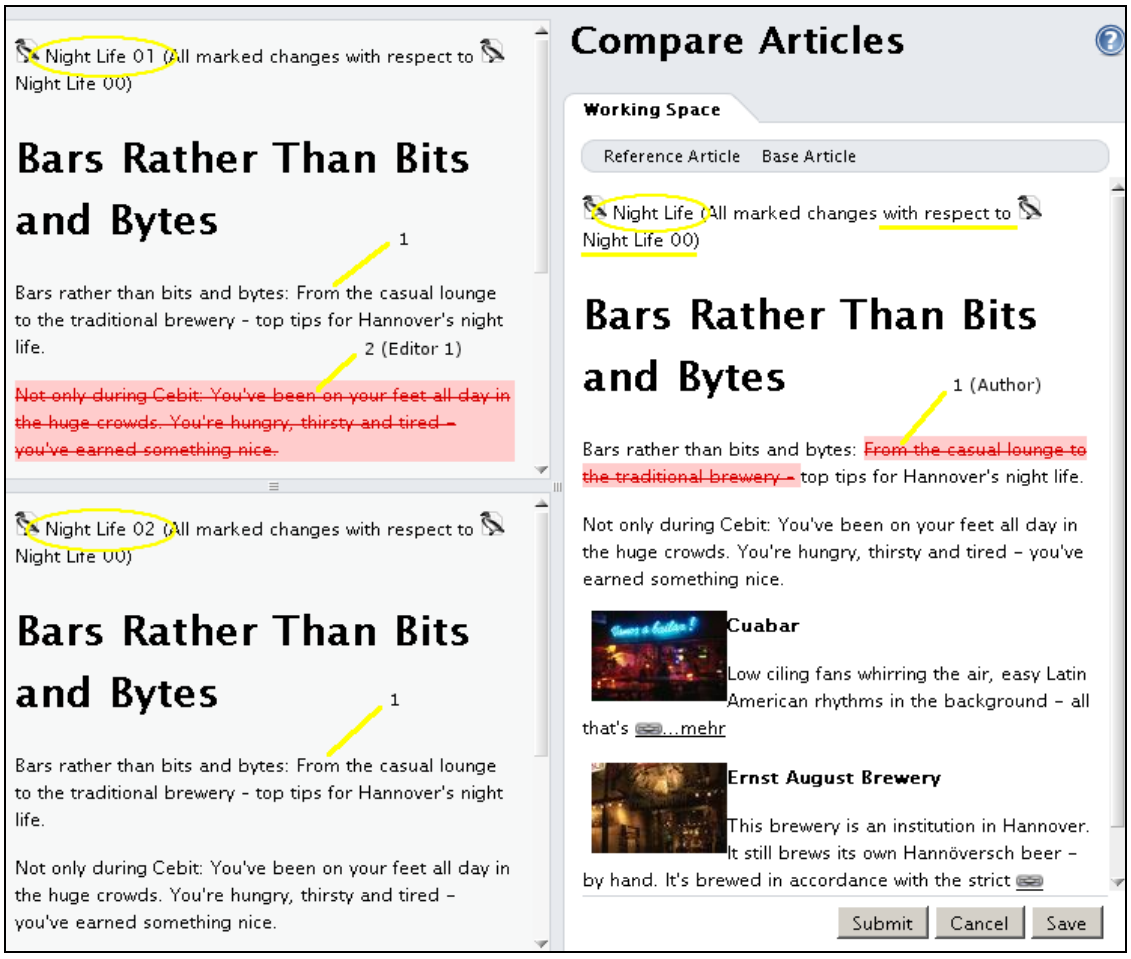

Night Life 01 (All marked changes with respect to Night Life 00)
Bars Rather Than Bits and Bytes
1
Bars rather than bits and bytes: From the casual lounge to the traditional brewery - top tips for Hannover's night life.
2 (Editor 1)
Not only during Cebit: You've been on your feet all day in the huge crowds. You're hungry, thirsty and tired – you've earned something nice.
Night Life 02 (All marked changes with respect to Night Life 00)
Bars Rather Than Bits and Bytes
1
Bars rather than bits and bytes: From the casual lounge to the traditional brewery - top tips for Hannover's night life.
Not only during Cebit: You've been on your feet all day in the huge crowds. You're hungry, thirsty and tired – you've earned something nice.
Compare Articles
Working Space
Reference Article
Base Article
Night Life 1 (All marked changes with respect to Night Life 00)
Bars Rather Than Bits and Bytes
1 (Author)
Bars rather than bits and bytes: From the casual lounge to the traditional brewery – top tips for Hannover's night life.
Not only during Cebit: You've been on your feet all day in the huge crowds. You're hungry, thirsty and tired – you've earned something nice.
Cuabar
Low ciling fans whirring the air, easy Latin American rhythms in the background – all that's ...mehr
Ernst August Brewery
This brewery is an institution in Hannover. It still brews its own Hannöversch beer – by hand. It's brewed in accordance with the strict
Submit
Cancel
Save

Figure 88: Multiple Comparison with Correct Base Article

9. Accept whatever changes you wish.

   By clicking on a selection in the reference article, you can copy the change into the working area. A click on the accepted change in the working area undoes the change.

   Using the context menu, you can manually re-edit in the WYSIWYG editor (right mouse key under Windows, other operating systems may differ).

   For more information on the use of the `Compare Articles` function, see Section 4.5.

10. Finally, confirm the dialog with `Submit`.

    Note: If you have not made any changes, you can exit the article comparison with `Cancel`.

The working version is updated.

Note: As the base article, you should always use the original version from which the reference articles and the working version originated.

4.7.8 Analyzing Links

The links of a Web article are saved in a note to enable automatic link management (link checker, see Section 4.6). This occurs automatically when you save in the article editor. If an image has been unintentionally deleted and then restored, for example, you should manually analyze the links again.

The analysis has two tasks: Firstly, the data is updated for the link checker (see Section 4.6). Secondly, links to moved targets are corrected automatically.

To carry out the analysis, you have two options:

- Open and save the article in the article editor
- Menu option `Tools > Rescan Article`

Opening of an article in the article editor was described in detail in Section 4.7.5.

The function `Rescan Article` is described here:

1. Open the Folders (see Section 3.1)
2. In the navigation tree on the left, select the folder where the article is located.
3. Activate the `List` or `Symbols` tab on the right and flag the required article with a check mark.

   You can select one or more articles.

   Note: You can also select folders. The folders and all their subfolders are searched recursively for articles.
4. Call the menu option `Tools > Rescan Article`.

   The links in the article are analyzed and corrected if necessary. Any information gained is stored as a note for the article (see Sections 4.6 and 3.5.18).

5 Modules and Active Elements

Modules enhance the portal with interactive elements. Examples include online forums, surveys or wikis.

In the editorial view, you can find them as special objects in the Folders (see Section 3.1.3), for example, as a forum or survey object. They are created and configured here. Most of these special objects must be set up by the system administrator. Ordinary users can only create surveys or add topics to a topic tree.

Any number of forums, surveys, wikis, etc. can exist.

The users work with the modules in the portal. There they can, for example, enter forum posts, create wiki articles or take part in a survey without switching to the editorial view.

The following sections explain how the modules work and provide information on configuration and maintenance:

- Section 5.1: Forum
- Section 5.2: Survey
- Section 5.3: Wiki
- Section 5.4: Document Share
- Section 5.5: Task Lists
- Section 5.6: News Channels and Subscriptions
- Section 5.7: Topic Trees

Note: Modules must be activated on installation. Therefore, some of the functionality described here is not available in every installation.

5.1 Forum

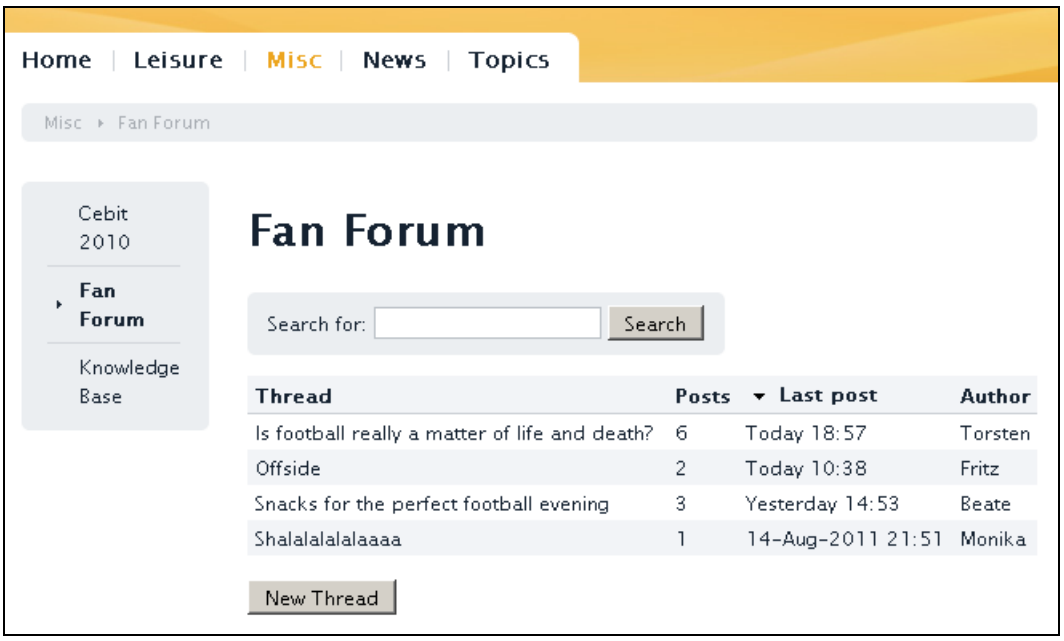

Home | Leisure | Misc | News | Topics
Misc ▸ Fan Forum
Cebit 2010
Fan Forum
Knowledge Base
Fan Forum
Search for: Search
Thread Posts Last post Author
Is football really a matter of life and death? 6 Today 18:57 Torsten
Offside 2 Today 10:38 Fritz
Snacks for the perfect football evening 3 Yesterday 14:53 Beate
Shalalalalalaaaa 1 14-Aug-2011 21:51 Monika
New Thread

Figure 89: Online Forum in the Portal (Thread List)

5.1.1 Introduction

In a forum, you can ask questions, answer questions, and follow the discussions of other participants. Usually, different forums are set up to cover different topical areas. Each forum consists of any number of threads which can be displayed in chronological order and can be searched.

Only the system administrator can set up a forum (see Section 5.1.3).

Note: The forum module is not available in every installation.

5.1.1.1 Roles

Not all users are authorized to use all the functions in the forum. We distinguish between the following:

- **Visitors**

  Visitors can only read posts.

- **Members**

  Members can read and write posts.

- **Moderators**

  A moderator can remove inappropriate posts. In moderated forums (see below) the moderator must approve submitted posts before they are published.

The system administrator defines the individual roles when the forum is set up (see Section 5.1.3.2). Access can also be granted to users who are not logged in.

5.1.1.2 Moderated Forums

A forum can be set up with or without moderation.

The posts in a moderated forum must be approved by a moderator before they are published. The posts are checked and approved in the moderation view (see Section 5.1.2).

The moderators are determined by the system administrator.

5.1.1.3 Subscriptions

If a news channel (see Section 5.6) has been set up, you can subscribe to the forum – or to individual threads. You will then be informed by e-mail of each new post.

You can find the `Subscribe` button on the start page of the forum and beside each discussion post.

Section 5.6.2 describes how you can modify your existing subscriptions.

5.1.1.4 Search in a Forum

There are different ways to search online forums:

1. Forum Search

   On the start page of each forum (see Figure 89), there is a search field above the thread list. Here you can start a full-text search (see Section 9.1.1) of all posts. Only posts from this forum are found.

2. Extended Forum Search

   The extended search provides additional options. First, start a standard forum search as described above. Then, on the results page, click on the link `Extended Search`. Now you can search by author, date, etc. Only posts from this forum are found.

3. Global Search

   The entry field for the global search is at the top right of the page frame (see Section 9.3). This does not, however, take forum posts into account. Therefore, you should first display the extended search parameters by either submitting an empty search or following the link `Extended Search` on the results page. Then under `Storage/Source`, set the check mark for `Forum Posts` and remove the check mark for `Documents and Folders`. Now all online forums are searched.

5.1.2 Moderating a Forum

A forum is moderated in the moderation view. This displays the submitted but not yet published posts of a moderated forum (see Section 5.1.1.2). Here the posts can be viewed, edited and approved.

You can access the moderation view using the button `Moderate Forum` which is provided for each moderator within a forum (see Section 5.1.1.1). Only a moderator can use this screen.

Figure 90: Moderation View in the Portal

5.1.2.1 Introduction

The moderation view consists of two screens. Initially you see a table with a list of all pending posts. A click on a post takes you to the detail view.

Submitted posts can be approved, rejected or their content edited.

5.1.2.2 Overview Page

All pending posts (see figure above) are listed on this page. In the drop-down menu you can select a specific forum or display the posts of all forums. By clicking in the table header, you can sort the list of posts.

The moderation functions are listed in the column on the right (see Section 5.1.2.4). You can process each post individually.

The quickest and most convenient method is successive processing using the detail screen. Simply click on the first post that you wish to process.

5.1.2.3 Detail Screen

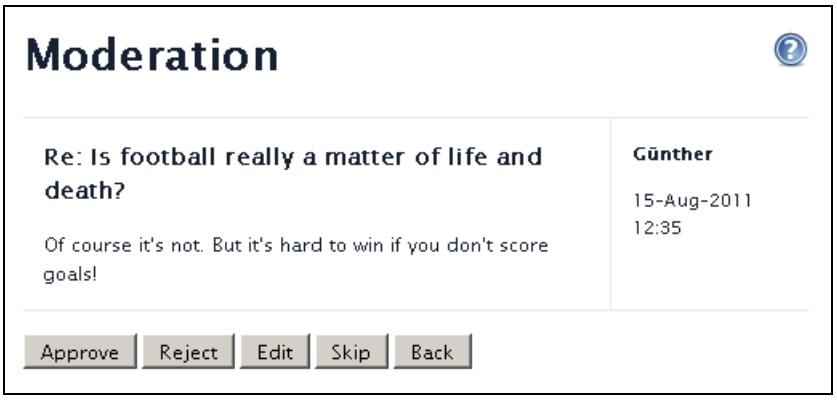


Figure 91: Detail Screen of the Moderation View

The detail screen displays a single discussion post in full. Using the buttons underneath, you can edit or skip the post.

Then the next post is displayed automatically. If there are no further posts, the overview page appears.

Using the `Back` button, you can cancel editing at any time and return to the overview page.

5.1.2.4 Moderation Functions

The following functions are available:

- `Approve`

  The `Approve` function publishes the submitted post.

- `Reject`

  The `Reject` function deletes the post.

- `Edit`

  Using the `Edit` function, you can re-edit the content of the post. Then you return automatically to the moderation view.

5.1.3 Setting Up a Forum

Only the system administrator can set up forums.

In the editorial view, forums appear as special objects (see Section 3.1.3). Each of these forum objects contains the configuration of a single forum. To set up a new forum, the system administrator creates a new forum object anywhere within the portal area (see Section 3.1.1).

Below you can find useful tips for the configuration.

For a general introduction to online forums, see Section 5.1.1.

Note: The forum module is not available in every installation.

5.1.3.1 Properties Dialog

Forums are configured in the properties dialog (see Section 3.3).

To create a new forum, you navigate to the required folder and choose `File > New… > Online Forum`. The properties dialog opens. You can call this up again later to make adjustments (menu `File > Properties`).

Below, we provide information on the individual dialog screens.

On the `General` screen (see Section 3.3.3), you enter the name, title and publication period. As with all contents of the portal, forums must also be published (see Section 4.1.4).

The `Forum` screen contains the special properties of the forum.

Figure 92: Properties of an Online Forum

The meaning of the different fields:

Attribute	Description
Moderation	Moderated forum? A moderated forum has the value `Moderated`, all others have the value `Free Discussion`. In a moderated forum new posts only become visible after they have been approved by a moderator (see Section 5.1.2).
Thread View	Type of display The posts of a single thread can each be displayed on a separate page or they can all be displayed consecutively on a single page. This last setting is appropriate for forums where the posts are expected to be short.
Language of Posts	Language of the majority of the posts For the full-text search, it is important to know the language of the contents. However, individual posts can deviate from this.

Table 16: Special Properties of a Forum

The settings on the `Security` screen are explained in the following section.

5.1.3.2 Defining Roles

The role assignment is controlled by way of the access control and work group settings on the `Security` screen (see Section 3.3.5). A user can be a visitor, member, or moderator in a forum (see Section 5.1.1.1):

- **Visitors** are all users who have read privileges (see Section 7.2.2).
- **Members** (can enter posts) are all users with the `Add Item` privilege (see Section 7.2.2).
- **Moderators** are the moderators of the assigned work group (see Section 6.1.2).

Typically you should set a work group and one of the following access control lists (see Section 7.3):

Access Control	Meaning
Open to members	Only members of the work group (see Section 6.1.2) can read and enter posts. Visitors are not permitted.
Open to members, world-readable	All users can read posts (visitors) but only members of the work group (see Section 6.1.2) can create posts themselves.
World-open	All users can read posts and create new ones.

Table 17: Typical Security Settings of a Forum

Ensure – especially in the case of moderated forums – that at least one moderator is entered in the assigned work group (see Chapter 6 "Group Admin").

5.1.3.3 Tips and Tricks

- The forum object is also a folder. You can save an intro article (see Section 4.1.3) in it as a welcome text.
- A forum can also be useful within a wiki (see Section 5.3.2) or within a document share (see Section 5.4.3).
- If users wish to be informed by e-mail about new posts, simply configure a news channel for the forum (see Section 5.6.3).
- If multiple forums exist in the same folder, you can publish the folder as a `Forum List` (see general properties, Section 3.3.3, selection list after `Published ... as`). All forums are listed with the newest forum post and the number of threads and posts.

5.2 Survey

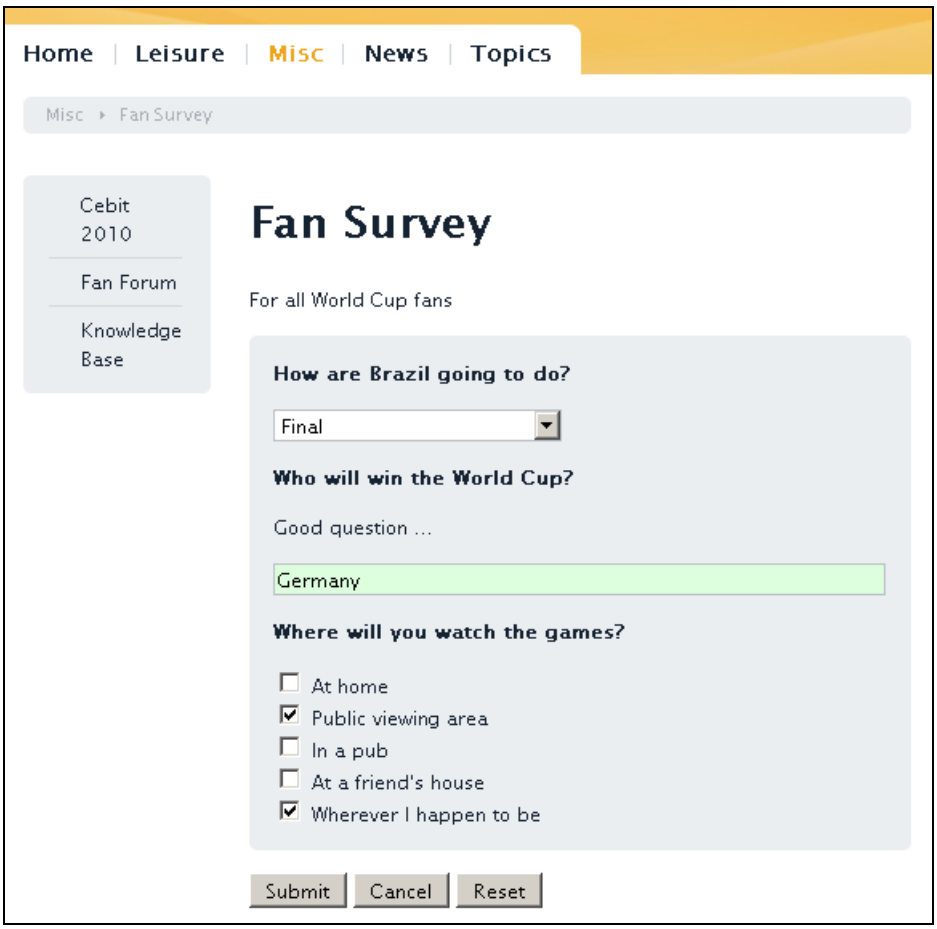


Figure 93: Survey in the Portal

5.2.1 Introduction

Online surveys are an important tool for capturing the mood and opinions of the users. To the participants, a survey is presented as a form with a list of questions. The replies are saved anonymously in a database and can be evaluated statistically.

Surveys can be placed at any location within the portal. They are either "open", this means open for all users with read privileges for this survey, or they are restricted to a specific group of participants.

Surveys are created and evaluated in the editorial view.

Note: The survey module is not available in every installation.

5.2.2 Setting Up a Survey

You create surveys with the survey editor.

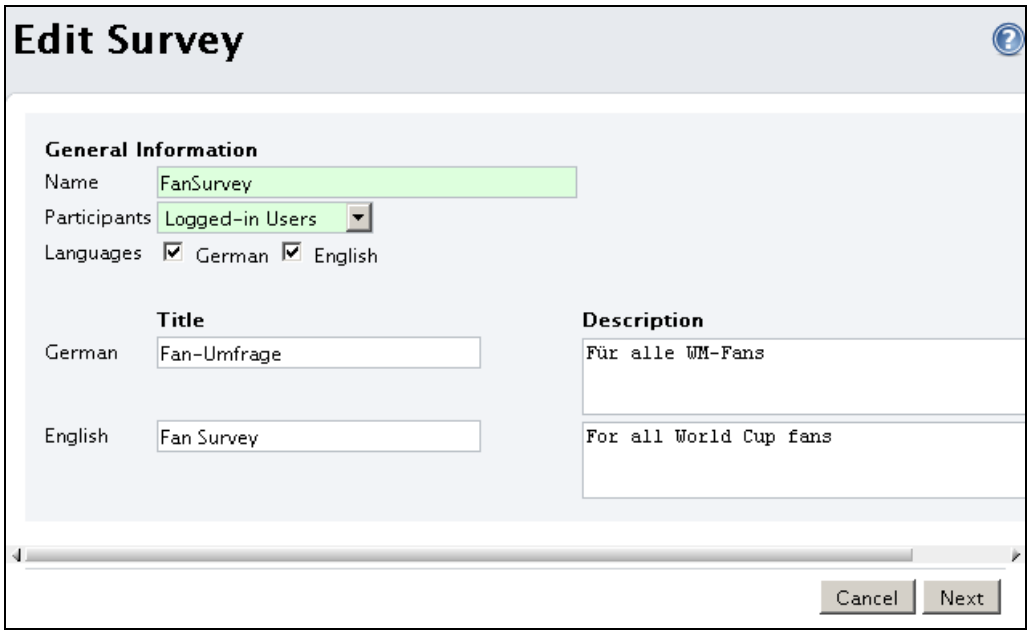


Figure 94: Survey Editor (Editorial View)

To create a new survey, you navigate to the folder you require in the file manager (see Section 3.2) and choose `File > New… > Survey`. The survey editor opens. You can open an existing survey by clicking on the name.

Note: If you do not have the required write privileges, start a publication process first (see Section 8.5).

In the editor you enter the following information:

- the name of the survey,
- participants (open or closed survey),
- the list of supported languages,
- a title and a description for each language and
- finally, the list of questions with title, description and type.

For further explanation, see the online help of the survey editor (open context help).

Then you open the properties dialog and publish the survey as you do with all other contents of the portal (see Section 3.5.16).

5.2.2.1 Where Is My Survey?

Surveys are not automatically displayed in the portal even if they have been published. This means that they neither appear in a folder listing nor as a navigation element in the page frame (see Section 4.1.3).

Therefore, you must write a Web article (see Section 4.1.2) in which you link (hyperlink) to the survey, and publish this article in the portal.

You can also send the article as an invitation mail as described in the next section.

5.2.2.2 Invitation Mail

For closed surveys, you must send an invitation mail to define who can participate. For open surveys, sending a mail is optional.

The invitations are sent by e-mail. To do this, you create a Web Article, (see Section 4.1.2), ideally with a link to the survey.

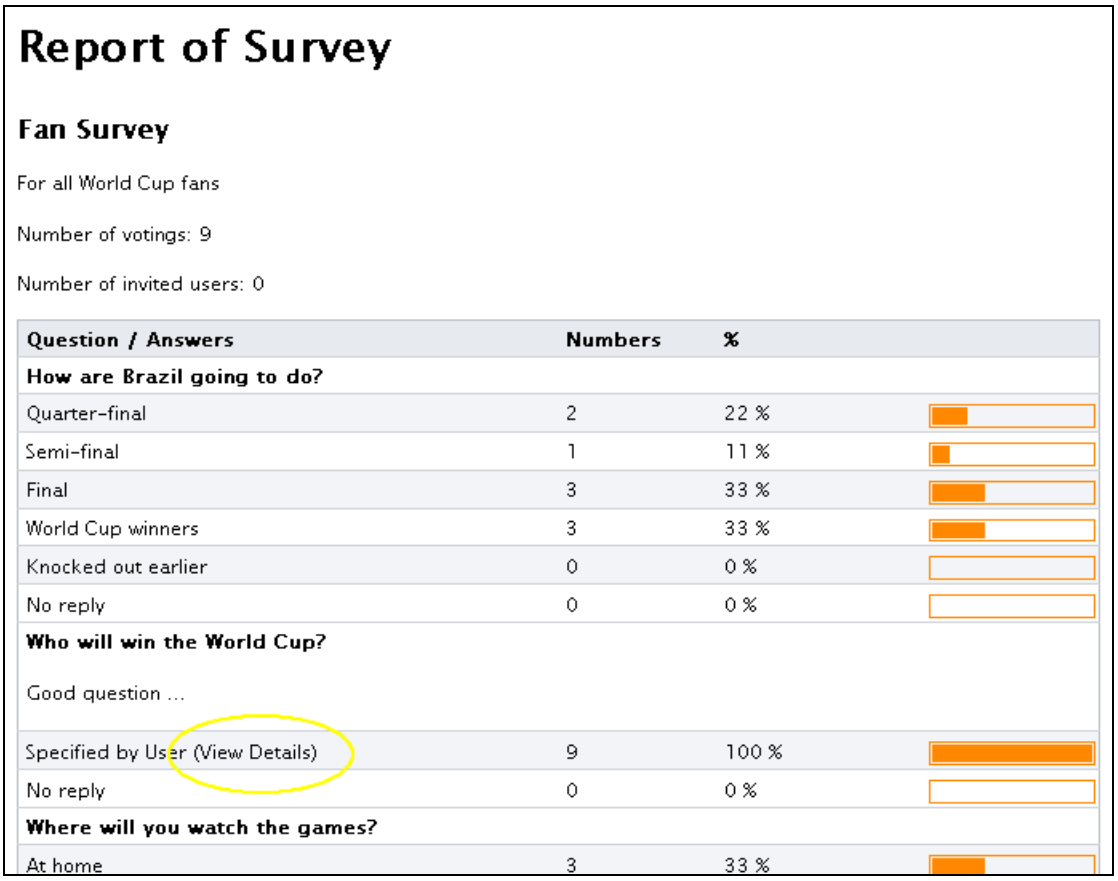
Before sending the e-mail, you should check the access privileges for the survey (see Section 3.5.17). Ensure that the intended participants have read privileges (see Section 7.2.2). Then choose menu option `Tools > Send Survey Invitation`. You are asked for the invitation article and you can select the addressees from those users with read privileges.

You can send the invitation several times.

Note: You must have write privileges for the survey.

Note: If you create the survey as part of a publication process, you must request an editor or administrator to send the invitation after publication.

5.2.3 Generating a Survey Report



Report of Survey

Fan Survey

For all World Cup fans

Number of votings: 9

Number of invited users: 0

Question / Answers	Numbers	%
How are Brazil going to do?		
Quarter-final	2	22 %
Semi-final	1	11 %
Final	3	33 %
World Cup winners	3	33 %
Knocked out earlier	0	0 %
No reply	0	0 %
Who will win the World Cup? Good question ...		
Specified by User (View Details)	9	100 %
No reply	0	0 %
Where will you watch the games?		
At home	3	33 %

Figure 95: Survey Report

Surveys are evaluated in the editorial view (see Section 2.4).

Select the relevant survey in the file manager (see Section 3.2) and choose menu option `Tools > Survey Report`. A pop-up window opens with a statistical evaluation. You can view each of the comments of the participants, which are, of course, anonymous (link `View Details`).

5.2.4 Tips and Tricks

- You can find important functions in the Tools menu (see Appendix 10.3.4).
- If you do not have write privileges, use the publication process (see Section 8.5). Here you can create the survey together with Web articles and images, and then have it approved. In this case, however, only an editor or administrator can send the invitation mail – following publication.
- You can reset the survey, this means deleting all entered data (menu `Tools > Delete Survey Data`). If you wish to proceed with the survey, you must then resend the invitation mail if applicable.

5.3 Wiki

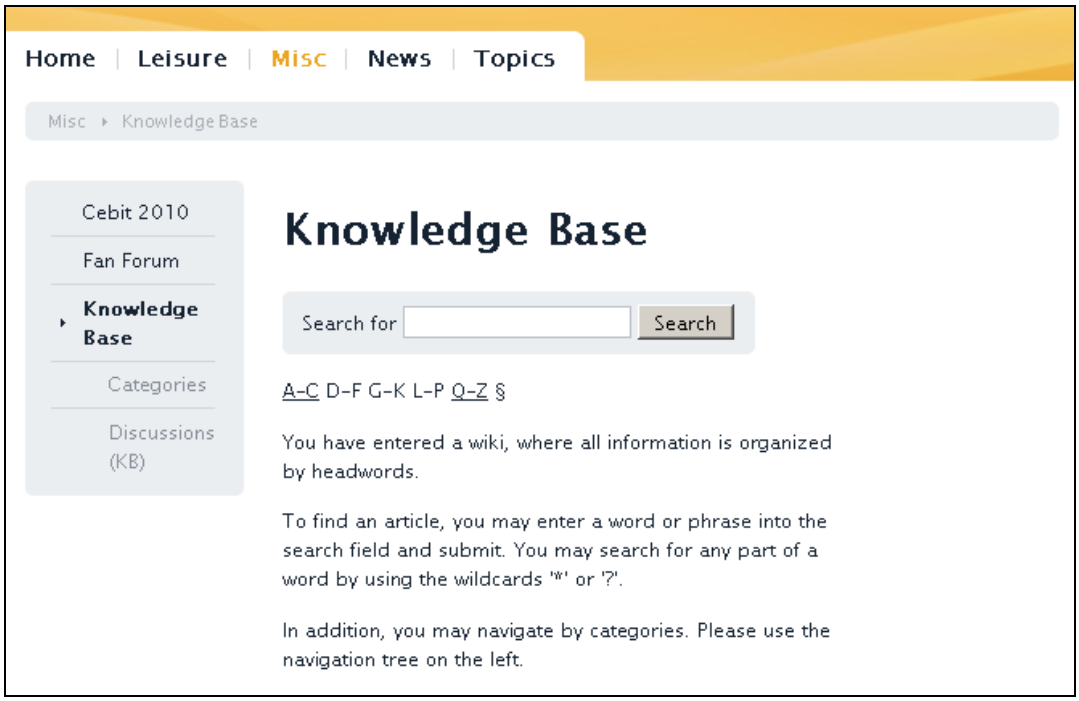

Home | Leisure | Misc | News | Topics
Misc ▸ Knowledge Base
Cebit 2010
Fan Forum
Knowledge Base
Categories
Discussions (KB)
Knowledge Base
Search for
Search
A-C D-F G-K L-P Q-Z §
You have entered a wiki, where all information is organized by headwords.
To find an article, you may enter a word or phrase into the search field and submit. You may search for any part of a word by using the wildcards '*' or '?'.
In addition, you may navigate by categories. Please use the navigation tree on the left.

Figure 96: Wiki in the Portal

5.3.1 Introduction

A wiki organizes articles according to headwords, similar to a dictionary. The articles are maintained by a team of authors in collaboration. Multiple wikis can be created for different topical areas.

An authorized user can add new articles or edit existing ones.

A wiki is set up by the system administrator (see Section 5.3.2).

Note: The wiki module is not available in every installation.

5.3.1.1 Roles

Individual users exercise different roles in a wiki:

- **Visitors**

  Visitors can only read articles.

- **Authors**

  Authors can write new articles and edit existing entries.

- **Moderators**

  Moderators can lock or delete articles. Normally, the author team edits the entries independently. The moderator becomes involved to settle conflicts between the authors or to delete incorrect entries.

The visitors, authors and moderators are determined individually for each wiki by the system administrator (see Section 5.3.2.2). Access can also be granted to users who are not logged in.

5.3.1.2 Synonyms

Not every word has a unique meaning nor is there a unique word for every meaning.

A synonym is one of two or more words that have the same meaning, for example, "student" and "pupil". In the wiki you can create as many synonyms for an entry as you wish. Simply click on the `Synonym` button under an article and follow the dialog.

Only authors and moderators can create synonyms.

5.3.1.3 Homonyms

A homonym is one of two or more words spelled and pronounced alike but different in meaning. For example, the word "bear" can mean both the animal (noun) and an action (verb). The entries in the wiki should be supplemented in this case. For example: "Bear (animal)", "bear (support)" and "bear (give birth to)". Each article describes exactly one meaning.

5.3.1.4 Disambiguation Pages

If a user searches for a homonym, an overview page with all entries is formed, the disambiguation page. The page appears with the following note:

- This is an automatically generated page; you can create an article instead: Bear (Disambiguation).

By clicking on the headword proposed, in the example, "Bear (Disambiguation)", you create a new entry. This entry is labeled a manual disambiguation page.

5.3.1.5 Headword Search

On the start page of each wiki (see Figure 96), there is a search field and below it, an index bar. Both of these enable access to the headword index.

Synonyms are also included in the index.

Enter a headword in the search field. You can use the wildcards `*` (any number of characters) and `?` (one character). When you click on `Search`, all matching entries are displayed.

If no entry exists yet for the headword, the following message is displayed:

- No entry found for this word, create new article: Test

By clicking on the headword, here "Test", the article is created. Only authorized users see this message.

For more tips, see "Word Search" in Section 9.1.2.

5.3.1.6 Index Bar

If you click in the index bar

- A-C D-F G-K L-P Q-Z §,

an alphabetical list of the entries appears (the letter intervals may differ from those shown here). If no entries exist, you cannot select the area (see Figure 96).

5.3.1.7 Topic Tree

A wiki can contain a topic tree (see Section 5.7). In the menu on the left, you then see an entry such as "Categories" or "Topics". The topics are arranged hierarchically under this.

While editing an article, the author can select individual topics from the topic tree (field `Keywords`). If a user subsequently navigates using the topic tree, the assigned articles are listed for each topic.

Note: Do not confuse the keywords of the article with the wiki headword which, in lexicography, is also known as the lemma. The headword is the title of the article, whereas the keywords (topics) are entered ad lib in a separate field.

The topics in the topic tree can, as with the wiki headwords, be searched or displayed as an alphabetical index (see Section 5.7.1.4).

5.3.1.8 Forum

A wiki can contain a forum. Here the authors can exchange ideas and suggestions for the articles.

You can find an introduction in Section 5.1.1.

5.3.1.9 Full-Text Search

A wiki does not offer a full-text search. This is handled by the global search (see Section 9.3) which you can access by way of the entry field in the page frame.

To search in a specific wiki, open the extended search (see Section 9.3.2) and restrict the search to the preferred wiki (`Storage/Folder`). Do not forget to flag `With Subfolders`.

5.3.2 Setting Up a Wiki

Only the system administrator can set up wikis.

This section provides important information on the configuration of a wiki. Each wiki exists as a special object in the Folders (see Section 3.1.3). To set up a new wiki, the system administrator creates a new wiki object at a suitable location within the portal area (see Section 3.1.1).

The basic use of a wiki is described in Section 5.3.1.

Note: The wiki module is not available in every installation.

5.3.2.1 Properties Dialog

Wikis are configured in the properties dialog (see Section 3.3).

To create a new wiki, you navigate to the folder you require in the file manager and choose `File > New… > Wiki`. The properties dialog opens. You can call this up again later to make adjustments (menu `File > Properties`).

Below, we provide information on the individual dialog screens.

On the `General` screen (see Section 3.3.3), you enter the name, title and publication period. As with all contents of the portal, wikis must also be published (see Section 4.1.4).

You can see the special properties on the `Wiki` screen.

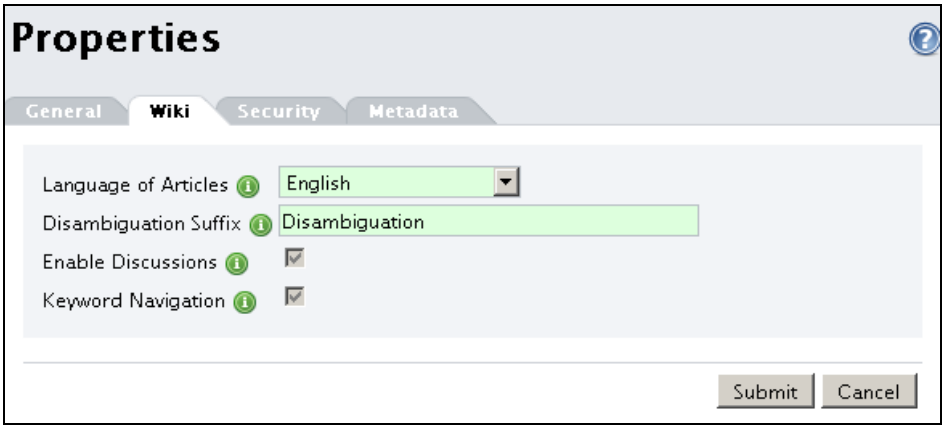


Figure 97: Properties of a Wiki

The following table describes the different fields:

Attribute	Description
Language of Articles	Language used in the articles For the full-text search, it is important to know the language of the contents. Each wiki supports only one language; specify this.
Disambiguation Suffix	Suffix for disambiguation articles The manual disambiguation pages (see Section 5.3.1.4) explain words with multiple meanings such as "bear" (animal, support, or give birth to). These special articles can be recognized by the suffix defined here, for example, "Bear (Disambiguation)". Caution: You should only change the default value "disambiguation" in exceptional and justified cases.
Enable Discussions	Create a forum? If you set a check mark here, a forum is created within the wiki (see Section 5.3.1.8) where authors can discuss contentious issues. Note: An existing forum can only be deleted directly in the file manager.
Keyword Navigation	Create a topic tree? Set a check mark here if you wish to create a topic tree (see Section 5.3.1.7) in the wiki. The authors can assign their articles to the topics of the topic tree. You can navigate within the topic tree in the portal.

Table 18: Special Properties of a Wiki

The settings on the `Security` screen are explained in the following section.

5.3.2.2 Defining Roles

The role assignment is defined using the access control and work group settings on the `Security` screen (see Section 3.3.5). A user can be a visitor, author, or moderator in a wiki (see Section 5.3.1.1):

- **Visitors** are all users who have read privileges (see Section 7.2.2).
- **Authors** (can create and change articles) are all users with the `Add Item` privilege (see Section 7.2.2).

- **Moderators** are the moderators of the assigned work group.

Typically you should set a work group and one of the following access control lists (see Section 7.3):

Access Control	Meaning
Open to members	Authors are the members of the work group (see Section 6.1.2). They can read and write articles. Visitors are not permitted.
Open to members, world-readable	All users can read articles (visitors) but only members of the work group (authors) can write them.
World-open	Anybody can read and edit articles, this means that everybody is qualified as an author.

Table 19: Typical Security Settings of a Wiki

Ensure that at least one moderator has been entered in the assigned work group (see Chapter 6 "Group Admin").

5.3.2.3 Editing Articles

The articles of a wiki are maintained using the portal view. They are arranged automatically in an index structure below the wiki object.

You can view these articles in the editorial view but you should only make changes in exceptional and justified cases.

5.3.2.4 Topic Tree

Have you configured your wiki with a topic tree (see `Keyword Navigation` in Section 5.3.2.1)?

If so, you should fill the tree with appropriate topics or, alternatively, grant write privileges to a user so that this user can create the topics.

For information on maintaining the topics, see Section 5.7.3. Setting of the access privileges is described in Section 3.5.17.

5.3.2.5 Tips and Tricks

- The wiki object is also a folder. You can save an intro article (see Section 4.1.3) in it as a welcome text.
- A wiki can also be useful within a document share (see Section 5.4.3).
- In addition to forums and topic trees, wikis can also contain document shares (see Section 5.4) and task lists (see Section 5.5).

5.4 Document Share

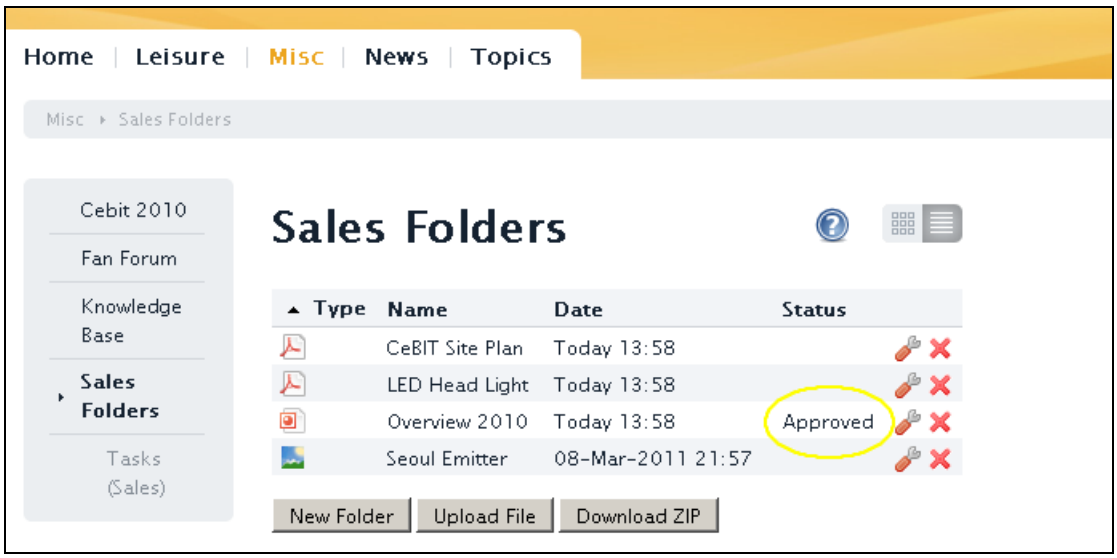


Figure 98: Document Share in the Portal

5.4.1 Introduction

Project teams and task forces sometimes need to maintain a collection of documents. For this purpose, the system administrator can set up a document share at an appropriate location in the portal. Team members can upload and read documents or grant approvals.

The documents and folders are managed in the document directory (see Section 5.4.2).

Creation of a document share is described in Section 5.4.3.

Note: The `Document Share` module is not available in every installation.

5.4.1.1 Roles

Not all users are authorized to use all the functions in the document share. We distinguish between the following:

- **Visitors**

  Visitors can read only.

- **Team Members**

  Members of the project team can upload documents and create folders. The system administrator decides whether they can also change the properties of existing documents and delete contents.

Visitors and members are defined individually for each document share by the system administrator. Access can also be granted to users who are not logged in.

5.4.1.2 Approval

If the document share is linked with a task list (see Section 5.5) you can request approval for each document. This function enables, for example, a technical evaluation.

The practical steps are described in Section 5.4.2.4.

For more information on approvals, see the description of tasks in Section 5.5.1.3.

5.4.2 Uploading and Maintaining Documents

When you navigate to a document share in the portal, the document directory opens (see Figure 98). There the documents and folders of the document share are listed. If you have the appropriate privileges, you can also edit these.

For an introduction to document shares, see Section 5.4.1.

5.4.2.1 Overview

The title of the page corresponds to the name of the document share or the current folder (see Figure 98).

Under this, the documents and subfolders are listed in a table. You can choose between two displays: symbol or list. You switch using the button:

By clicking on the name of a subfolder, you can display its contents. Alternatively you can navigate using the navigation tree on the left.

Authorized users can make use of the numerous editing functions (see below).

5.4.2.2 Documents

A document share enables the exchange of documents within a work group or a project team. You can upload any kind of document. To do this, use the button `Upload Document` at the end of the page.

If you wish to view a document, just click on its name or icon. The document is opened in a separate browser window. If your browser cannot display the document, a download is offered.

5.4.2.3 Folder

For a better overview, you can split the documents between subfolders. You create a new folder using the button `New Folder` at the end of the page.

5.4.2.4 Approval

If the document share is linked with a task list (see Section 5.5) you can request approval (see Section 5.5.1.3) for each document. Using this function, you can carry out a technical evaluation, for example.

You request approval using the Tools menu (next to each document). In the subsequent dialog, you must specify a responsible person, a due date, and other information. The responsible person approves or rejects the document.

In order to request an approval, you must have write privileges in the **Task List**.

The current approval status is displayed in the `Status` column (list display, see Figure 98) or as a tooltip of the task icon (when you hover the mouse cursor over the icon). By clicking on the status or the icon, you open the approval request.

Note: If multiple approval requests exist for the same document, a selection list appears first.

5.4.2.5 Editing Functions

For each list entry, you can select from the following functions:

- (Tools)

  By clicking on this icon, you open the Tools menu (see below).

- (Delete)

  The document or folder is deleted – after confirmation.

- (Status)

  A click on this icon takes you to the approval request for this entry. In the symbols view, this icon replaces the `Status` column (see Section 5.4.2.4 above).

The function keys at the end of the page always refer to the current folder:

- `New Folder`

  Here you can create a new subfolder.

- `Upload File`

  The dialog which follows enables you to upload one or more documents.

- `Download ZIP`

  The current folder, together with all its documents and subfolders, is downloaded as a ZIP archive.

Using the icon (Tools) next to the entries, you can access the Tools menu:

- `Download ZIP`

  The document or folder is downloaded as a ZIP archive.

- `Upload and Overwrite`

  Here you can overwrite the document; this means upload it again from your local PC.

- `Properties`

  The properties screen displays the description, file type, owner, creation date and modification date. With the appropriate privileges, you can rename the document or the folder and modify the description.

- `Start Approval`

  If the document share is linked with a task list, you can use this function to create a new approval request (see Section 5.4.2.4 above).

Note: Depending on the type of the document or folder, and your personal privileges, some of these functions may not be available.

5.4.3 Setting Up a Document Share

Only the system administrator can set up document shares.

Document shares are set up in the editorial view. They exist as special objects (see Section 3.1.3) in the Folders. There the system administrator can create a new document share at any time.

Document shares enable project teams and work groups to administer shared documents without having to leave the portal view. You can find an introduction in Section 5.4.1.

This section describes the configuration of a document share.

Note: The `Document Share` module is not available in every installation.

5.4.3.1 Properties Dialog

Document shares are configured in the properties dialog (see Section 3.3).

To create a new document share, you navigate to the folder you require in the file manager (see Section 3.2) and choose menu option `File > New… > Document Share`. The properties dialog opens. You can call this up again later to make adjustments (menu `File > Properties`).

Below, we provide information on the individual dialog screens.

On the `General` screen (see Section 3.3.3), you enter the name, title and publication period. As with all contents of the portal, document shares must also be published (see Section 4.1.4).

You can find the special properties on the `Document Share` screen.

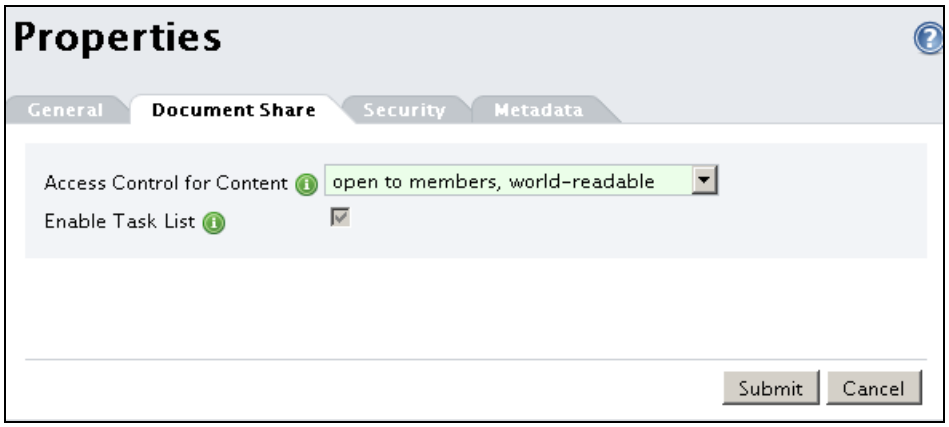


Figure 99: Properties of a Document Share

The fields in detail:

Attribute	Description
Access Control for Content	ACL for the documents and folders. The documents and subfolders receive this access control list (or ACL, see Section 7.2). See examples in the next section.
Enable Task List	Create a task list? If you set a check mark here, a task list is created within the document share (see Section 5.5). Note: An existing task list can only be deleted directly in the file manager.

Table 20: Special Properties of a Document Share

The settings on the `Security` screen are explained in the next section.

5.4.3.2 Defining Roles

The role assignment is controlled by way of the work group and access control settings on the `Security` screen (see Section 3.3.5). A user can be a visitor or team member (see Section 5.4.1.1):

- **Visitors** are all users who have read privileges (see Section 7.2.2).
- **Team Members** (can upload documents) are all users with the `Add Item` privilege (see Section 7.2.2).

Team members can upload new documents and create folders. This does not automatically mean that they can work in subfolders and that they can change or delete existing contents. This is regulated by the `Access Control for Content` (screen `Document Share`, see Table 20 above):

- To upload contents to the subfolder, you must have the `Add Item` privilege (see Section 7.2.2).
- To change or delete documents or folders, you must have general write privileges (see Section 7.2.2).

Here we describe typical configurations. A work group should always be set:

Access Control	Access Control for Content	Meaning
Open to members	Member-writable	The team members are all the members of the work group (see Section 6.1.2). They can upload and edit contents. Visitors are not permitted.
	Open to members	The members of the work group (team members) can upload new contents but only administrators can change existing contents. Visitors are not permitted.
Open to members, world-readable	Member-writable, world-readable	The members of the work group (team members) can upload and edit contents. All users can read contents (visitors).

Access Control	Access Control for Content	Meaning
	Open to members, world-readable	The members of the work group (team members) can upload new contents but only administrators can change existing contents. All users can read contents (visitors).
World-open	Writable	All users can upload and edit contents, everybody is a team member.
	World-open	All users can upload new contents but only administrators can change existing contents.

Table 21: Typical Security Settings for Document Shares

Note: As a rule, team members should also be granted write privileges for existing contents. Otherwise, only system administrators and the administrators of the work group (role `Admins`) can update or delete documents and folders.

5.4.3.3 PublishingAgent

Documents and folders that are not uploaded via the portal, but by other means, for example, via a network drive (see Section 3.1.5), are not immediately published and are not displayed in the portal (see Section 4.1.4).

The `PublishingAgent` publishes these contents automatically to make them visible – usually within 10 minutes. The `PublishingAgent` is configured by the system administrator using external tools (see "Administration Manual inxire ECM").

Consult your system administrator.

5.4.3.4 Tips and Tricks

- The document share object is also a folder. You can save an intro article (see Section 4.1.3) in it as a welcome text.
- In addition to task lists, document shares can contain other special functionalities such as wikis or forums (see Section 5.3 or 5.1).
- If users wish to be informed by e-mail about new documents, simply configure a news channel for the document share (see Section 5.6.3).

5.5 Task Lists

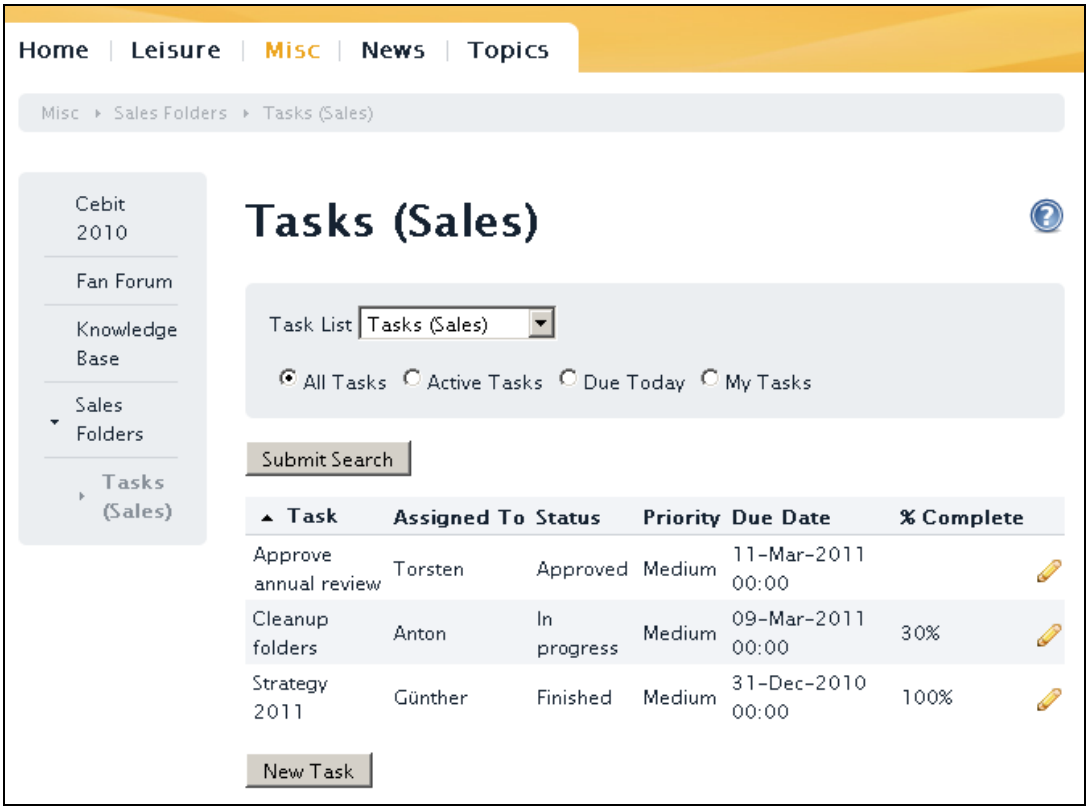

Home | Leisure | Misc | News | Topics
Misc ▸ Sales Folders ▸ Tasks (Sales)
Cebit 2010
Fan Forum
Knowledge Base
Sales Folders
Tasks (Sales)
Tasks (Sales)
Task List Tasks (Sales)
All Tasks Active Tasks Due Today My Tasks
Submit Search
Task Assigned To Status Priority Due Date % Complete
Approve annual review Torsten Approved Medium 11-Mar-2011 00:00
Cleanup folders Anton In progress Medium 09-Mar-2011 00:00 30%
Strategy 2011 Günther Finished Medium 31-Dec-2010 00:00 100%
New Task

Figure 100: Task List in the Portal

5.5.1 Introduction

Teams often need a way of tracking tasks that are assigned to the members. For this purpose, the system administrator can set up a task list. Task lists can appear at any place within the portal but they are especially useful within a document share (see Section 5.4).

Depending on the configuration, all team members or only a moderator receive the right to create new tasks. Each task is assigned to a responsible person. This person can maintain the degree of completion and enter comments.

The daily work is described in Section 5.5.2.

Setting up a task list is explained in Section 5.5.3.

Note: The task module is not available in every installation.

5.5.1.1 Roles

The system administrator assigns the roles to the users:

- **Visitors**

  Visitors can only read tasks.

- **Team Members**

  Depending on the configuration, team members can create new tasks or can only read tasks.

- **Moderators**

  Moderators can create tasks and can modify existing tasks. If a substitute is required, for example, the moderator enters the new responsible person.

Visitors, team members and moderators can have tasks assigned to them. Independent of their roles, they can then maintain the degree of completion and enter comments.

The system administrator assigns the roles for each task list individually. Access can also be granted to users who are not logged in.

5.5.1.2 Tasks

In addition to the degree of completion and the responsible person, tasks also have other useful attributes.

Attribute	Description
Title	Name of the task
Description	A short description
Assigned To	Responsible user This user can change the status, degree of completion and comment.
Priority	Importance of the task (high, medium, low).
Status	Editing status The values may differ depending on the type of task; the standard values are: • `Not started` • `In progress` • `Finished`
% Complete	Degree of completion in percent This is optional information provided by the responsible person.

Attribute	Description
Start Date	Planned start date
Due Date	Planned due date
Comment	Comment of responsible person

Table 22: Attributes of a Task

5.5.1.3 Approvals

In addition to general tasks, you can also administer approval requests (or approvals) in task lists. Approvals relate directly to documents in a document share (see Section 5.4.1.2). This function enables a technical evaluation, that is, the document can be approved or rejected.

For this, the task list must be located within a document share.

Approvals differ from general tasks in that they are linked to a document and the status list is also slightly different:

- `Not started`
- `In progress`
- `Approved`
- `Rejected`

In addition, the degree of completion (`% Complete`) is **not** available. This makes it easy to recognize approvals in the task list (see Figure 100, first line).

Approval requests are normally created and processed directly in the document share (see Section 5.4.2.4). There you can see the approval status of each document (see Figure 98, last line).

5.5.2 Creating and Editing Tasks

Tasks are created and maintained in the portal. When you navigate to a task list in the portal, you see a list of all tasks (see Figure 100). Authorized users can edit the tasks.

A task list can be used by a project team or work group to organize internal tasks. For a general introduction, see Section 5.5.1.

5.5.2.1 Overview

The page title corresponds to the name of the task list in which you are located (see Figure 100).

Below the title are the filter functions. In the drop-down menu you can select a different task list or display tasks from all task lists. You can filter the results list by activity and by due date.

The tasks are displayed in a table. By clicking in the table header, you can sort the list.

By clicking on the name of a task (or the pencil), you can open and view it. If you have the required privileges, you can also edit it.

5.5.2.2 Filter Functions

You can restrict the display using the following criteria:

- `All Tasks`

  All tasks – without restrictions.

- `Active Tasks`

  Only those tasks that have not yet been completed.

- `Due Today`

  Tasks that are due to be completed today.

- `My Tasks`

  Your tasks, that is, those tasks for which you have been entered as the responsible person.

5.5.2.3 Creating a Task

Authorized users can see the `New Task` button at the end of the page (see Figure 100). By clicking on this button, you open the dialog for creating a general task (see Section 5.5.1.2). You can enter details such as the responsible person, the due date and a short description.

Note: This button only appears if you have selected a single task list in the drop-down menu above, and if you also have the required privileges.

Note: Approvals for documents are not requested here but in the document directory (see Section 5.4.2.4).

5.5.2.4 Editing Functions

For each task, you can select from the following functions:

- (Edit)

  By clicking on this icon, you open the task for editing. If you do not have write privileges, you can only open and view the task.

- (Delete)

  The task is deleted – after confirmation. Only a moderator can delete a task (see Section 5.5.1.1).

5.5.3 Setting Up a Task List

Only the system administrator can set up task lists.

Task lists are created and configured in the editorial view. There they exist as special objects in the Folders (see Section 3.1.3). The system administrator can set up a new task list at any location (see Section 3.1.1) at any time.

Useful information on configuration of a task list is provided below.

Task lists support teamwork with formal administration of tasks. You daily work with task lists is described in Section 5.5.2; for a general introduction, see Section 5.5.1.

Note: The task module is not available in every installation.

5.5.3.1 Properties Dialog

Task lists are configured in the properties dialog (see Section 3.3).

To create a new task list, you navigate to the folder you require in the file manager (see Section 3.2) and choose menu option `File > New… > Task List`. The properties dialog opens. You can call this up again later to make adjustments (menu `File > Properties`).

On the `General` screen (see Section 3.3.3), you enter the name, title and publication period. As with all contents of the portal, task lists must also be published (see Section 4.1.4).

The settings on the `Security` screen define the users' privileges and thus their assignment to logical roles. See the following section.

Note: There is no separate screen for task lists.

5.5.3.2 Defining Roles

The role assignment is controlled using the access control and work group settings on the `Security` screen (see Section 3.3.5). A user can be a visitor, team member, or moderator of a task list (see Section 5.5.1.1):

- **Visitors** are all users who have read privileges (see Section 7.2.2).
- **Team Members** (can enter tasks) are all users with the `Add Item` privilege (see Section 7.2.2).
- **Moderators** are the moderators of the assigned work group (see Section 6.1.2).

Typically you should set a work group and one of the following access control lists (see Section 7.3):

Access Control	Meaning
Open to members	The team members are all the members of the work group (see Section 6.1.2). These can enter tasks. Visitors are not permitted.
Open to members, world-readable	All users can view tasks (visitors) but only members of the work group (team members) can create new tasks.
World-open	Anybody can read tasks and enter new tasks, everybody is a team member.

Table 23: Typical Security Settings for Task Lists

Ensure that at least one moderator has been entered in the assigned work group (see Chapter 6 "Group Admin").

5.5.3.3 Tips and Tricks

- A task list can also be useful within a wiki (see Section 5.3) or within a document share (see Section 5.4).
- If the task list is located within a document share (see Section 5.4), then approval requests for documents (see Section 5.5.1.3) can also be entered.

5.6 News Channels and Subscriptions

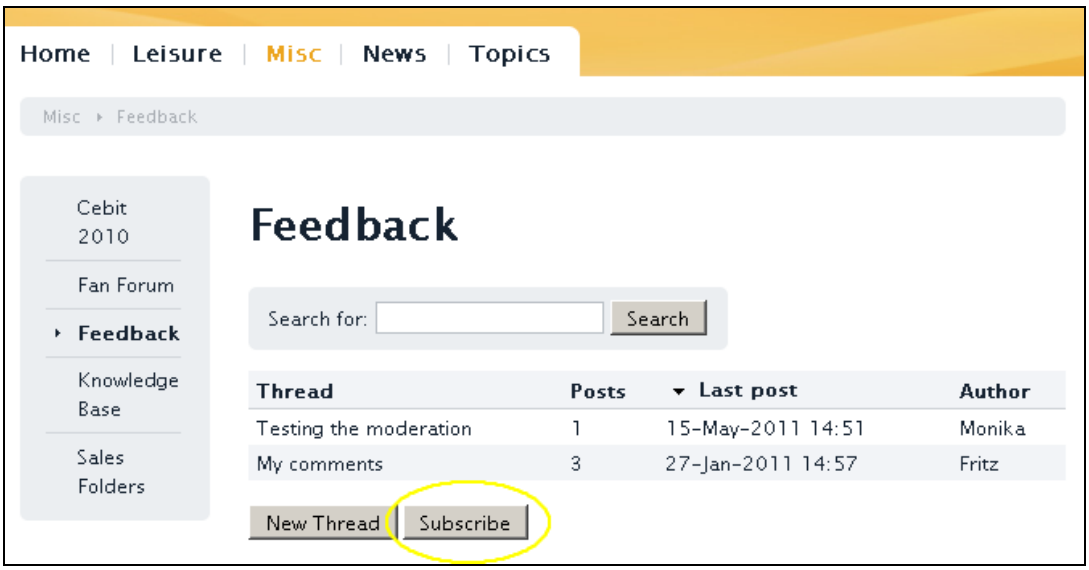


Figure 101: "Subscribe" Button in an Online Forum

5.6.1 Introduction

A news channel sends e-mail messages at regular intervals with information on new or changed contents in the portal. All logged-in users can subscribe to the news channel. Any number of news channels can be set up to cover different areas of the portal, for example, the news area or an online forum.

News channels are set up by the system administrator (see Section 5.6.3).

5.6.1.1 News Channels

The administrator can set up a news channel in any public or private area of the portal.

We distinguish between three types of channels:

- **Online Forum**

  News channel for an online forum (see Section 5.1).

- **Newsletter**

  New articles are created primarily for the news channel and are sent in the form of a newsletter. As a rule, the system administrator configures an online archive. There you can read older issues (see Section 5.6.3.3).

- **Update Info**

  The news channel covers a specific area of the portal. The subscribers are informed of all new and changed articles in this area.

Each news channel sends all messages in a defined language.

The information (articles, posts, etc.) is sent exclusively via e-mail.

5.6.1.2 Subscribe

You can subscribe to a news channel in its entirety or you can restrict the subscription to individual threads of a forum or topics of a topic tree (see Section 5.7).

Depending on what you wish to do, there are different ways to set up a subscription:

- Using the start page of a forum or the portal area:

  On the start page of a forum or portal area with a news channel, you can find the button `Subscribe` at the bottom (see Figure 101). With one click, you subscribe to all posts of this channel.

- Using a discussion post:

  While you are reading a post in the forum, the button `Subscribe` enables you to subscribe to this particular discussion.

- Using the topic tree:

  In the topic tree (see Section 5.7), the button `Subscribe` is provided for each topic. This way you only subscribe to articles on this topic.

  Note: If you are reading an article and wish to subscribe to similar articles, you must first navigate to the topic tree. To do this, you click on one of the keywords on the right under `Read More…` (if available).

- Using the `Subscriptions` form:

  On the `Subscriptions` form (see Section 5.6.2), all available news channels are displayed but you cannot subscribe to individual topics or discussions here.

Note: If the button `Subscribe` is not available, no news channel has been set up. If a subscription already exists, the function changes to `Edit Subscription`.

5.6.1.3 Edit Subscriptions

You can view your subscriptions on the `Subscriptions` form and you can modify or cancel them as required. For a description of the form, see the next section.

5.6.2 My Subscriptions

On the `Subscriptions` form, you can view and edit your subscriptions to news channels. News channels can be set up for various areas of the portal, for example, in the news area or in a forum. Each channel sends e-mail messages to subscribers at regular intervals with information on changed articles or discussion posts.

You can access this screen by way of the utilities at the top of the page. Follow the links `Settings` and `Subscriptions` (see Section 2.1, only visible for logged-in users).

For an introduction to news channels and subscriptions, see Section 5.6.1.

Figure 102: Subscriptions of a User

5.6.2.1 Overview

The `Subscriptions` screen lists all available news channels. A check mark in the first column indicates that a channel is subscribed. Next to the name of the channel, the navigation path to the relevant category in the portal is displayed. The path is usually stored with a link so that you can check the content.

In the column on the right, there is a link to the details (see Section 5.6.2.4). These show, for example, whether you have subscribed to an entire forum or only to individual discussion threads.

Below we describe each of the elements of the screen.

Do not forget to confirm any changes to your subscriptions by choosing `Submit`.

5.6.2.2 Name

This is the name of the news channel, for example, "General News".

Note: The name here is valid for the current language. Users with a different language setting will see a translation if one exists.

5.6.2.3 Path

The navigation path to the area in the portal from which the posts are sent. If this area can also be read online, you can go there by clicking on the path.

The language is shown in parentheses. The news channel primarily sends posts with this language. If articles are present in multiple languages, then as a rule, a news channel is set up for each language.

Note: A German-speaking user can, of course, also subscribe to an English news channel (and vice versa).

5.6.2.4 Details

The `Details` link leads to an auxiliary dialog. There you can enter or change the details of the subscription.

Figure 103: Details of a Subscription

The `Level of Detail` determines the extent to which you wish to be informed of new posts:

- `Complete Articles`

  A complete copy of each new or changed article or post will be sent to you.

- `Summary`

  You receive a list of all new or changed articles or posts. Hyperlinks lead to the display in the portal.

Note: In some cases, not all options are available.

In addition, if the news channel belongs to an online forum (see Section 5.1), you can restrict the subscription to selected `Threads` (see Figure 103):

- `All Threads`

  You receive information on all threads.

- `My Threads`

  Only the discussions that you have started yourself are included in the subscription.

- `My Threads and Selected Ones`

  In addition to discussions that you have started yourself, you receive information on posts from the threads listed further down on the screen (only if you have already subscribed to individual threads).

- `Only Selected Threads`

  You receive information only on posts from the threads listed below (only if you have already subscribed to individual threads).

If you are no longer interested in certain threads, you can exclude these from your subscription by removing the check mark and choosing `Submit`.

Note: You cannot subscribe to new threads here, you can only do that within the forum. Use the `Subscribe` button under the forum posts.

Some news channels offer the facility to subscribe to articles by `Keyword` from a topic tree (see Section 5.7). In this case you have the following selection options:

- `All Keywords`

  You receive information on all new and changed articles.

- `Only Selected Keywords`

  The subscription covers only articles on the topics listed underneath (only if you have already subscribed to individual topics).

If you are no longer interested in certain topics, you can exclude these from your subscription by removing the check mark and `Submitting` the screen.

You cannot subscribe to new topics here, you can only do that within the topic tree. Simply navigate to the relevant topic and click on the `Subscribe` button under the article list.

Note: The keywords (if there are any) are displayed to the right of each article (under `Read more…`). By clicking on a keyword, you access the topic tree where you can subscribe to the topic.

5.6.3 Setting Up a News Channel

Only a system administrator can set up news channels.

The system administrator sets up and maintains news channels in the editorial view. A news channel is, from a technical perspective, a note object attached to an online forum or a folder in the portal area. In the list view of the file manager, you can easily recognize a news channel by its icon .

Notes are described in Section 3.4.

For an introduction to news channels and subscriptions, see Section 5.6.1.

5.6.3.1 Properties Dialog

News channels are configured in the properties dialog (see Section 3.3).

To create a new news channel, you navigate to the folder in the file manager where the online forum or the required folder are located, flag the online forum or folder with a check mark and choose menu option `Tools > Create News Channel`. The properties dialog opens.

You can call this up again later to make adjustments. Simply click in the list view of the file manager on the news channel icon (column `Notes`).

On the `General` screen (see Section 3.3.3), you must enter the name and title. Only the title can be seen in the portal (for example, on the `Subscriptions` screen, see Section 5.6.2).

Caution: A user can only subscribe to the channel if a title has been entered for the user's language (see Section 4.1.4).

The `News Channel` screen determines the basic configuration of the news channel. For a description, see Section 5.6.3.2.

On the following `Details` screen, the selected channel type is configured in detail. The various settings are described in Section 5.6.3.3.

Do not forget to confirm your entries with the button `Submit`.

5.6.3.2 News Channel Screen

The `News Channel` screen determines the basic configuration of the news channel. In addition to a short description, you determine here the type of the news channel (see Section 5.6.1.1):

- `Online Forum`

  This is the only selection option if the channel belongs to an online forum.

- `Newsletter`

  The channel sends a newsletter at regular intervals. This is only appropriate if the channel belongs to a folder.

  The newsletters must be placed in the folder directly as articles or documents and they must be published (see Section 4.1.4), but they need not necessarily be visible (ACL `private`, see Section 7.3).

- `Update Info`

  The channel sends information on new or changed articles and documents in this portal area.

Figure 104: Creating a News Channel for a Folder

5.6.3.3 Details Screen

Detailed configuration is carried out on the `Details` screen.

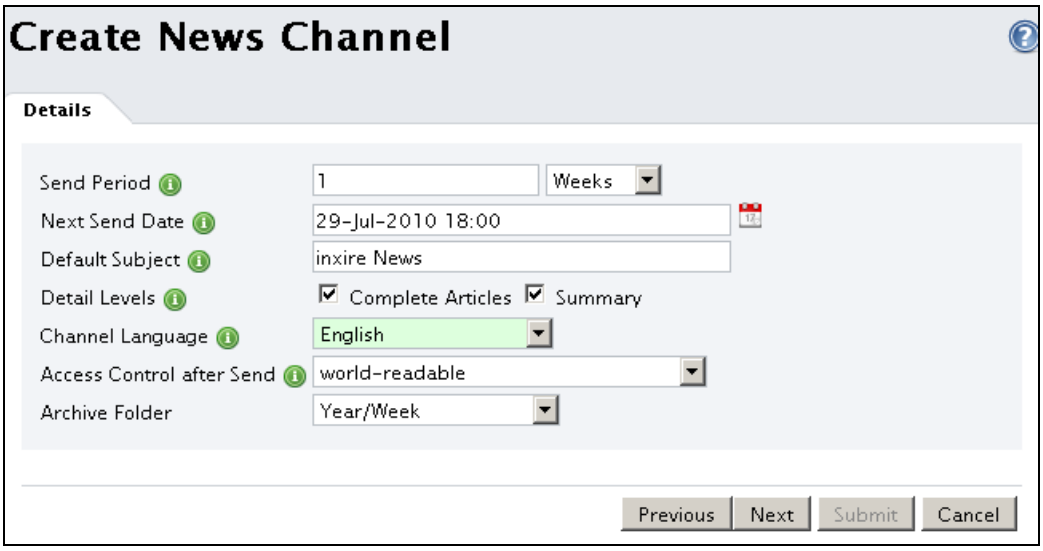


Figure 105: Detailed Configuration of a News Channel of Type "Newsletter"

Note: The icon indicates an info text. Simply place the mouse pointer over it.

The following table describes the different settings:

Attribute	Description
Send Period	Time intervals for periodical distribution. For newsletters, intervals of days or weeks are recommended. For online forums or change notifications, the intervals should be shorter. If the field is left empty, information is sent whenever a new post is available.
Next Send Date	Time of the next distribution. When setting up for the first time, you should enter the date when information is to be sent first. Subsequently, this field will be updated automatically. Only valid for periodical send type, that is, if the field `Send Period` is set.
Default Subject	Start of the subject line. The subject line of an e-mail consists of the default subject and the title of the post. If empty, the title of the news channel is used instead (see `General` screen).
Detail Levels	The allowed levels of detail. Either individual posts are sent with the complete text (`Complete Articles`) or the subscribers receive only a list of hyperlinks (`Summary`). The posts must then be read online. Here you determine the choice available to the subscribers.
Channel Language	The language of the news channel. A news channel does not "see" posts in all languages. It functions as a user with this language setting. See explanation in Section 5.6.3.4.
Access Control After Send (newsletters only)	Newsletters cannot normally be read in the portal until after they are sent (online archive). This access control list (ACL, see Section 7.3) determines which users are granted access.
Archive Folder (newsletters only)	Structure of the online archive. After being sent, newsletters can be moved to an archive. The archive is created in the folder to which the news channel belongs. You can usually use it to navigate in the portal.

Attribute	Description
Search Subfolders (update info only)	If this check box is flagged, subfolders are also searched for new articles and documents.

Table 24: Special Properties of a News Channel

5.6.3.4 Languages and Title

A news channel is linked to a specific language (see attribute `Channel Language` in Table 24). This is not necessarily the language of the posts because an English text, for example, can be approved for German users (see Section 4.1.4).

When browsing through the posts, the news channel works similar to a user with this language setting.

Independent of this, you define the titles of the news channel on the `General` screen. These determine which users can **subscribe** to the channel.

You can compare this with a German radio station which occasionally plays songs in English. Independent of this, people of all languages can listen (subscribe) to the station.

5.6.3.5 Deleting a News Channel

To delete a news channel, you must open the notes of the online forum or folder and choose the action `Delete`.

You can find instructions for opening the list of notes in Section 3.5.18.

Figure 106: List of Notes Containing News Channels

You can recognize news channels by their type `News-Ch`. The `Details` column contains the name and the language of the channel.

Note: In the example, a second, German-language news channel is configured. This sends primarily German-language articles.

5.6.3.6 Tips and Tricks

- In multilingual portals, you should set up a separate news channel for each language to provide all users with content in their language (set respective titles).
- An online forum supports only one language (see Section 5.1.3.1). Here you require only one news channel with identical language setting.

5.7 Topic Trees

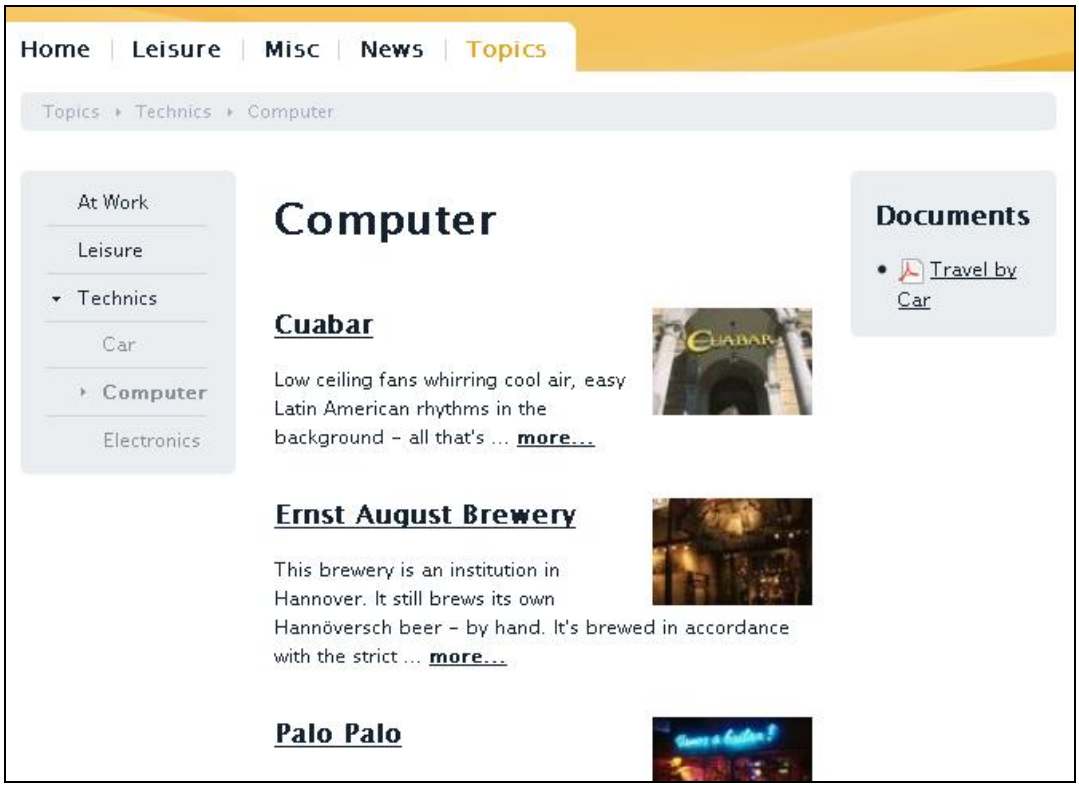


Figure 107: Navigation in the Topic Tree (Portal)

5.7.1 Introduction

In a topic tree, the terms (called topics or categories) are arranged hierarchically. Articles and other contents can be assigned to these topics or categories. A user can navigate using the topics and display assigned contents.

Topic trees can be used both in the portal view and the editorial view. In the portal, you will often find articles linked with topics (tagging). In the topic tree, the articles are listed in short form (see Figure 107). Conversely, a list of the assigned topics (if there are any) appears next to each article (see Figure 108).

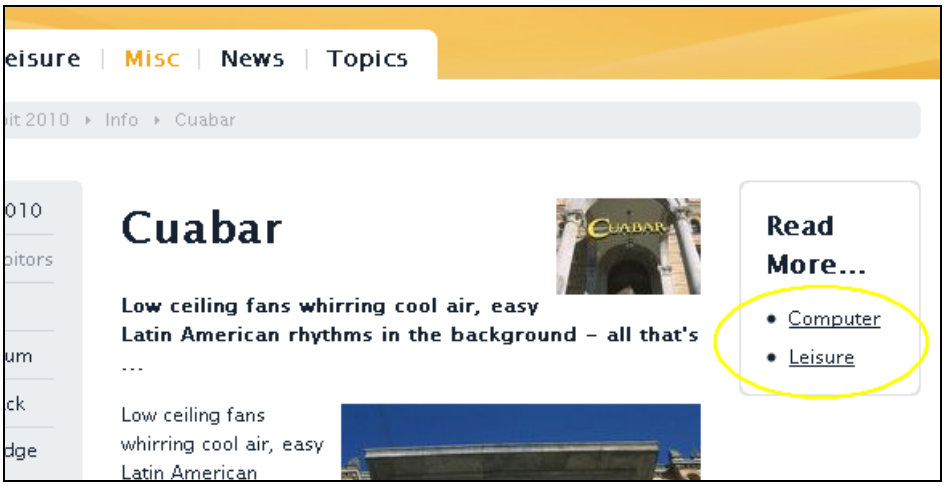


Figure 108: Topic List of an Article in the Portal

In the editorial view, you can also navigate using the topics and display all linked documents on the `Topic Search` tab page of the file manager (see Section 3.2.3.2).

Any number of topic trees can be created, for example, under the start page of the portal and in each wiki (see Section 5.3.1.7). Setting up new topic trees is a task for the system administrator (see Section 5.7.2). However, the administrator can delegate maintenance of the individual topics by granting write privileges to selected users (see Section 5.7.3).

5.7.1.1 Assigning Topics

The links between topics and documents are established in the editorial view as part of metadata maintenance (see Section 3.3.6). There are two options:

1. Using the standard meta-attribute `Keywords`. Here, any number of words can be entered separated by a comma.

   If a topic tree exists in the same portal area as the document is located, this is provided as an entry help. The keywords are automatically linked with the topic tree.

2. Using a site-specific meta-attribute (see Section 3.3.6) which is linked to a specific topic tree (see "Administration Manual inxire ECM").

   You can only select topics from this topic tree.

To maintain the meta-attributes, you use the `Metadata` screen in the properties dialog (see Section 3.3.6).

The `Keywords` of an article are an exception. These are maintained together with the content in the article editor (see Section 4.3). Note that it is only possible to enter keywords if the article template being used permits keywords (see Section 4.2.4).

5.7.1.2 Synonyms

Often, a term does not have one unique word assigned to it, for example, "student" and "pupil" refer to the same thing. In this case the most commonly used word should be created as the topic, that is, "student". The other words are then added as synonyms.

Maintaining the synonyms simplifies the search for the correct topic, for example, when keywording the contents (see above).

Creation of a synonym is described in Section 5.7.3.3.

5.7.1.3 Homonyms

A homonym is one of two or more words spelled and pronounced alike but different in meaning. For example, the word "bear" can mean both the animal (noun) and an action (verb).

In this case, multiple topics should be entered in the topic tree, each distinguished by an appropriate suffix, for example, "bear (animal)", "bear (support)" and "bear (give birth to)".

Note: A topic tree contains terms (meanings), not words.

5.7.1.4 Searching in the Topic Tree

In the portal, on the start page of a topic tree (see figure below), you will find a search field and below it, an index bar. Both of these enable access to the topic index.

Synonyms are also included in the index.

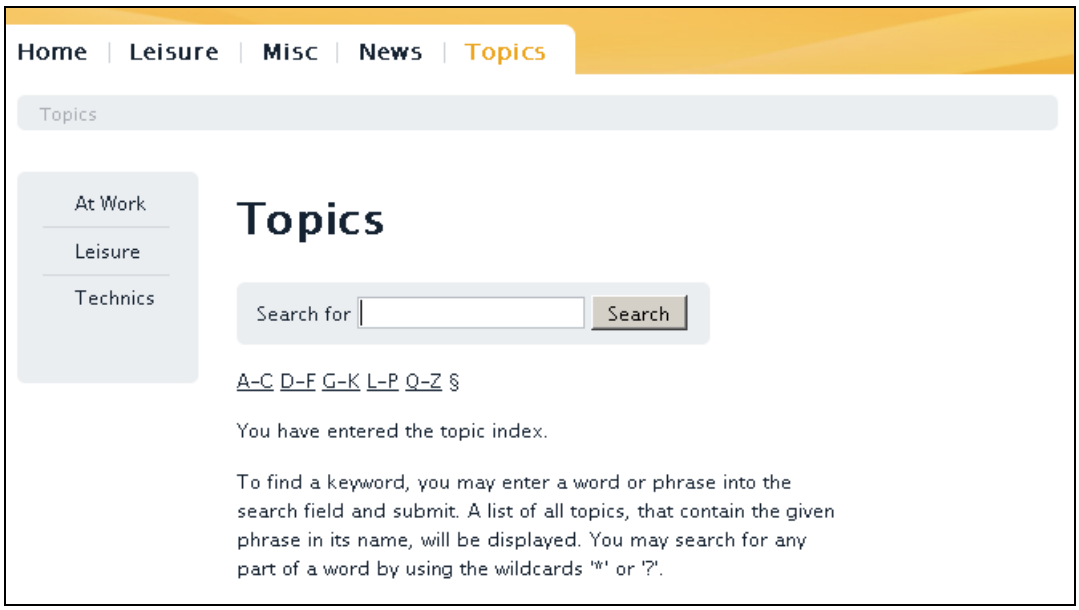

Home | Leisure | Misc | News | Topics
Topics
At Work
Leisure
Technics
Topics
Search for
Search
A-C D-F G-K L-P Q-Z §
You have entered the topic index.
To find a keyword, you may enter a word or phrase into the search field and submit. A list of all topics, that contain the given phrase in its name, will be displayed. You may search for any part of a word by using the wildcards '*' or '?'.

Figure 109: Start Page of a Topic Tree in the Portal

If you enter a keyword in the search field and choose the button `Search`, all matching topics and synonyms are listed. You can use the wildcards `*` (any number of characters) and `?` (one character).

5.7.1.5 Index Bar

Alternatively, you can use the index bar:

- A-C D-F G-K L-P Q-Z §

When you click on an area, an alphabetical list of the entries appears (the letter intervals may differ from those shown here). If no entries exist, you cannot select the area.

5.7.2 Setting Up a Topic Tree

Only a system administrator should set up a topic tree.

The starting point of a topic tree is a special object of the Folders (see Section 3.1.3). This cannot be created directly using the inxire ECM interface. However, it is possible to copy an existing topic tree (see Section 5.7.2.1). If the topic tree is to be in a wiki, you can also create it when configuring the wiki (see `Keyword Navigation` in Section 5.3.2).

Per default, on installation of inxire ECM, an empty topic tree is generated in the start folder of the content repository (`/Categories`, see Section 3.1.1) and you can use this when carrying out metadata maintenance (see Section 3.3.6).

Caution: This topic tree is part of the metadata configuration. It must under no circumstances be deleted or renamed without adapting the metadata configuration (see "Administration Manual inxire ECM").

5.7.2.1 Copying a Topic Tree

The simplest way to create a new topic tree is to copy an existing one. In the file manager (see Section 3.2), navigate to the superordinate folder, flag the existing topic tree with a check mark and choose menu option `File > Copy` (instructions in Section 3.5.7).

The tree and all contained topics are copied.

If appropriate, you should remove topics which you do not require from the tree (menu `File > Delete`, and possibly delete them in the wastebasket also, see Section 3.5.11). You can safely make editing changes to the topic tree. It is no longer linked to the original tree.

Note: A topic tree should preferably be created in the start directory of the portal (see Section 3.1.1) or a wiki (see Section 5.3.2). Only then, can it be used for indexing articles (see Section 5.7.1.1).

Note: If topic trees are to be navigable in the portal, they must be published (instructions in Section 3.5.16).

5.7.2.2 Tips and Tricks

- You can save an intro article (see Section 4.1.3) in the start directory of the topic tree as a welcome text.
- A topic tree is also useful within a wiki (see Section 5.3.2). To create the topic tree, open the wiki configuration (see Section 5.3.2), set a check mark for `Keyword Navigation` and submit the dialog.

5.7.3 Maintaining Topics

The topics of a topic tree are maintained in the editorial view. Any user with write privileges (see Section 7.2.2) in the topic tree can add new topics and change existing ones.

To do this, you open the Folders (see Section 3.1) and navigate to the required topic tree. There you can use the menu bar of the file manager (see Section 3.2) to call one of the following functions:

- `File > New.. > Topic / Category`

  Creates a new topic (see Section 5.7.3.1). The properties dialog opens (see Section 3.3).

- `File > Find Topic`

  Finds an existing topic and inserts it (see Section 5.7.3.2). A topic can be incorporated in any number of locations in the hierarchy.

- `Tools > Create Synonym`

  Adds a synonym to an existing topic (see Section 5.7.3.3). Before calling it you must flag the topic with a check mark. The meaning of synonyms is explained in Section 5.7.1.2.

- `File > Properties`

  Calls the properties dialog for an existing topic. Before calling it, you must flag the topic with a check mark.

  Note: You access the properties of a synonym by clicking on the icon or by way of the list of notes (see Section 3.4).

In the following sections you can find instructions for commonly used actions.

Note: Topics and synonyms that are to be visible in the portal must be published (see Section 4.1.4).

5.7.3.1 Creating a New Topic

To create a new topic, use the menu option `File > New… > Topic / Category` (see instructions in Section 3.5.1):

1. Open the Folders (see Section 3.1).
2. In the navigation tree on the left, select the superordinate topic under which the new topic is to be created.
3. Activate the `List` or `Symbols` tab on the right and choose menu option `File > New…`.
4. Click on `Topic/Category` in the subsequent selection dialog.

   The properties dialog opens:

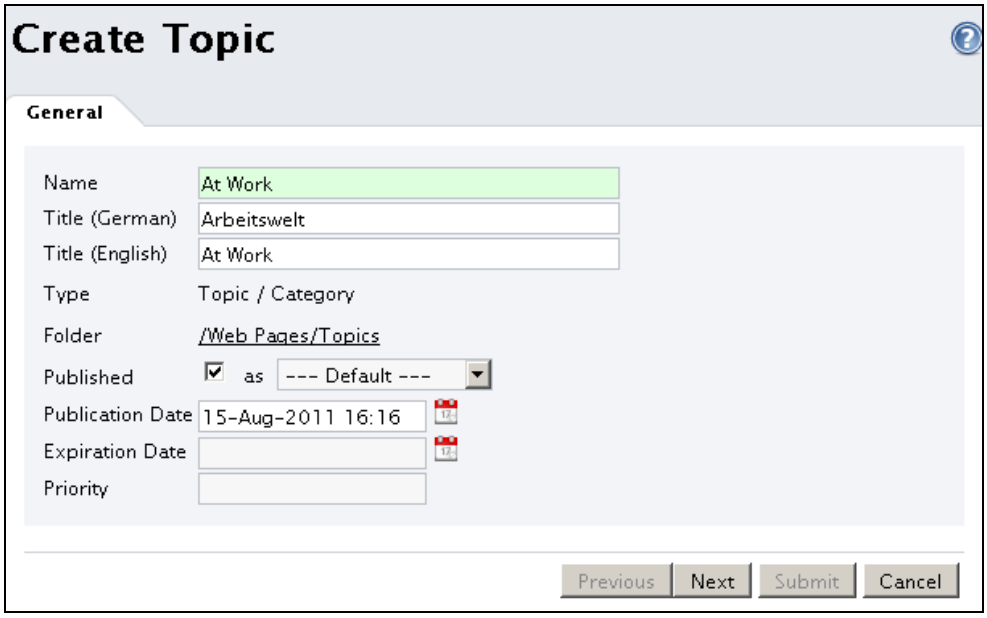


Figure 110: Defining the Properties of the New Topic

5. Enter at least the following information:

   a. `Name` (here: `At work`)

   b. `Title` and `Publication Date` (if the topic is to be visible in the portal, see Section 4.1.4)

   Note: The name must be unique. In the case of an error message, either find the existing topic and incorporate it (see Section 5.7.3.2) or use a suffix (see Section 5.7.1.3).

6. Go to the final screen of the properties dialog (button `Next`) and confirm the dialog with `Submit`.

   The topic is created.

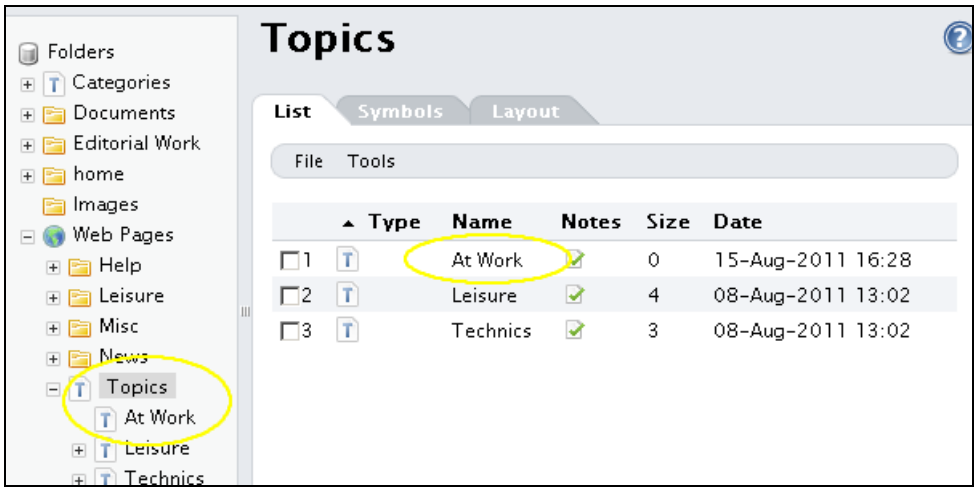


Figure 111: New Topic "At work" Under /Web Pages/Topics

5.7.3.2 Finding and Incorporating a Topic

Each topic represents a term (see Section 5.7.1.3). Therefore the name of the topic must be unique in the topic tree. On the other hand, a term, for example, "car", can belong to various superordinate terms, for example, "technology", "traffic" or "leisure".

If you now attempt to create the same term (here: "car") under a second superordinate term, you will see the message "Object ... already exists. Name must be unique". You should, instead, find the existing topic and incorporate it here.

To do this, choose the function `File > Find Topic`:

1. Open the Folders (see Section 3.1).
2. In the navigation tree on the left, select the superordinate topic (superordinate term) under which the topic is to be incorporated.
3. Activate the `List` or `Symbols` tab on the right and choose menu option `File > Find Topic`.

   A search dialog opens for topics:

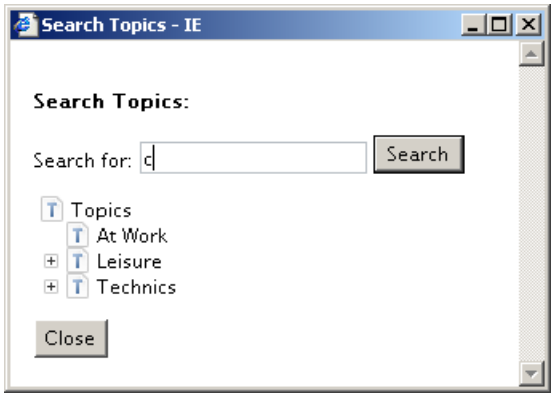


Figure 112: Finding a Topic

4. Enter part of the name and choose the button `Search`. You can use the wildcards `*` (any number of characters) and `?` (one character). Then click on the name to select the required topic.

   For more information on the effective use of search dialogs, see Section 9.5.

   Note: Alternatively, you can click on the topic in the topic tree under the search field. Open closed areas by clicking on the plus sign.

   The required topic is inserted into the list:

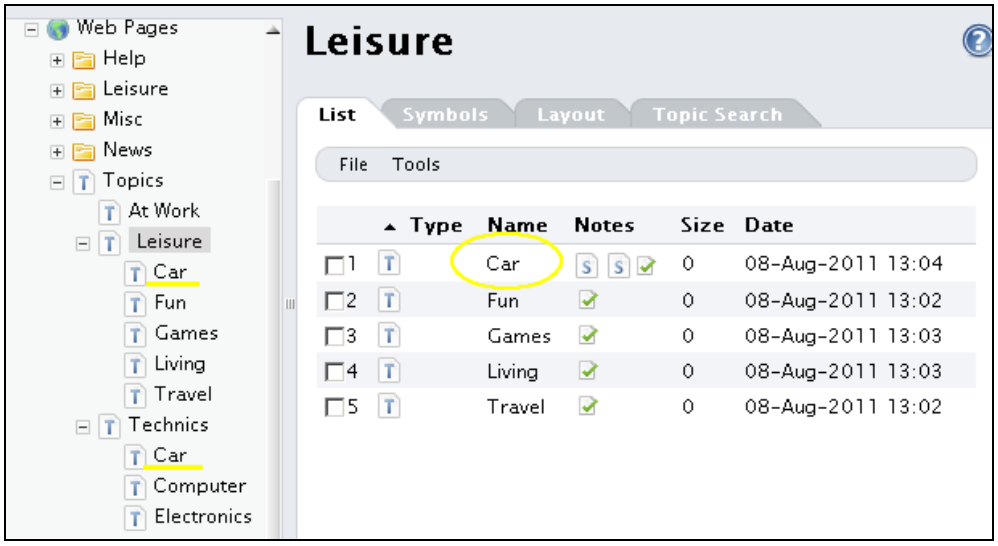


Figure 113: Topic "Car" Now Under "Leisure"

Note: This function also finds deleted topics in the wastebasket.

Note: You can also search for synonyms, for example, "automobile" (see Section 5.7.1.2). However, the related topic ("car" in this case) is always inserted.

5.7.3.3 Creating a Synonym

To add a synonym to an existing topic (see Section 5.7.1.2), you must navigate to the superordinate topic, flag the topic with a check mark and choose menu option `Tools > Create Synonym`.

The properties dialog opens (see Figure 110 above). Enter a unique name. In the portal area, also enter the title and publication date (see Section 5.7.3.1).

After you `Submit` the dialog, the synonym is created. You can recognize synonyms by their icon (column `Notes` in Figure 113).

5.7.3.4 Deleting a Topic

You delete a topic just as you would a document or folder, using menu option `File > Delete`. The topic is moved to the wastebasket.

You delete synonyms using the action `Delete` in the list of notes (see Section 3.4). To open these, flag the related topic in the file manager and choose `File > View Notes`.

Caution: If a topic has been deleted and is in the wastebasket, any attempt to create the topic again causes the error message "Object ... already exists. Name must be unique". In this case, reinsert the topic (see Section 5.7.3.2).

6 Group Administration

6.1 Introduction

In group administration you maintain work groups. Work groups combine users in a single unit and thus enable easy allocation of access privileges (see Chapter 7). Within a work group, one or more roles are assigned to each user in order to more precisely define the user's tasks and privileges.

You access group administration using the main menu in the editorial view under `Admin > Group Admin`. Only logged in users are granted access here. The system administrator can configure further restrictions (access objects, see "Administration Manual inxire ECM").

If you wish to make changes, you must have administration rights, that is, you must be a system administrator or the administrator of a work group.

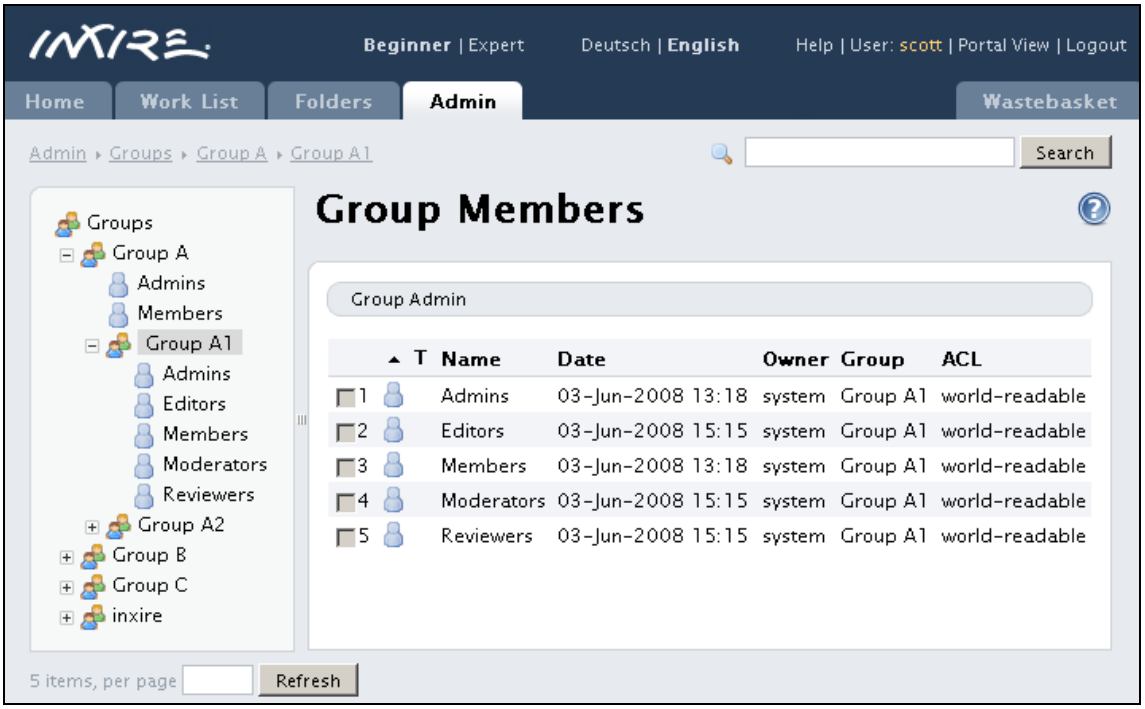


Figure 114: Group Administration

6.1.1 Work Groups

The work groups ( ) usually map the hierarchical structure of the company. In addition, project teams and task forces are frequently created as work groups especially when shared content is to be maintained.

Users can belong to one or more work groups. They can perform different roles in each work group. The roles available are described in the next section.

6.1.2 Roles

A user can have one or more roles within a work group, for example, as an ordinary member, an administrator or an editor. The roles define which tasks the user has within the work group.

As a rule, a new role means extended privileges for the documents, folders and special objects (see Section 3.1.3) of the work group. The access control list regulates the details for each individual object (see Section 7.3).

Some roles have predefined tasks. For example, moderators can approve new posts or delete existing ones in the work group's online forums (see Section 5.1.1.1).

The available roles:

- **Admins**

  These are the administrators of the work group. They maintain the list of members. As a rule, they have write privileges for the work group's objects (depending on the access control list, see Section 7.3).

  Note: Admins are also automatically administrators in all subordinate work groups.

- **Editors**

  The editors have a special task in the publication process (see Section 8.5.3): They can check submitted contents and approve them for publication. They frequently have write privileges in the editorial working area (see Section 3.1.1).

- **Members**

  This role is assigned to ordinary members. It is required because users cannot be entered in the work group directly.

  Note: Members are also automatically members in all superordinate work groups.

- **Moderators**

  Moderators have a special task in online forums, wikis and task lists (see Chapter 5).

- **Reviewers**

  The reviewers evaluate submitted work as part of the publication process (see Section 8.5.3).

6.1.3 Users

A user is identified in the system by a unique user name. The user can perform multiple roles in different work groups.

Maintenance of the user accounts is not described here but in the "Administration Manual inxire ECM".

6.1.4 Ordinary Groups

When you assign a user to a role (see Section 6.4.2), a selection dialog opens. Here you can also search for `Groups`. These are not work groups but rather user groups that have, for example, been copied from a company directory. They are maintained outside the system (see "Administration Manual inxire ECM").

You can assign roles to these ordinary groups also. The assignment is valid for all members of the group.

6.2 Maintaining Work Groups

In Figure 114 you can see the navigation tree on the left with the work group hierarchy. The active roles appear under each work group. If you navigate to a role, the assigned users are listed on the right.

Users cannot be assigned directly to a work group but only by way of a role. If the required role does not yet exist, you must first add this to the work group. Then you can assign the user to the role. You perform both tasks with the menu option `Group Admin > Find Member`.

For detailed instructions, see Section 6.4.

6.2.1 External Maintenance

The system can be configured in such a way that users and groups are maintained externally, for example, in an LDAP system or Active Directory Server. In this case you have limited use of group administration.

Consult your system administrator.

6.2.2 Tips and Tricks

- Directly under a work group, you can only enter other work groups and roles.
- Navigate to a role to add users.
- You can search for users or groups to display the group memberships. Use the menu option `Group Admin > Search Group/User` (see Section 6.4.10).

6.3 Delegating Responsibility

The work group hierarchy usually reflects how your company is organized. Just as all company decisions are not made at the top level, the group administration in inxire ECM enables delegation of administrative tasks to subordinate units.

Therefore, the system administrator can nominate one or more administrators (role `Admins`) for any location in the work group hierarchy.

The administrator of a work group can:

- Enter users in the work group or remove them from it,
- Add roles,
- Change the objects of the work group (depending on the access control list, see Section 7.3),
- Create or delete subordinate work groups,
- Administer all subordinate work groups,
- Nominate additional administrators, for example, in subordinate work groups.

This delegation principle enables flexible administration of the work groups at local level. For example, task forces and project teams can be created as work groups without having to resort to the central administration.

6.3.1 Implicit Roles

To enable administrators (role `Admins`) to administer subgroups, they are automatically assigned as administrators of the subgroups. Conversely, the members (role `Members`) nominated by the administrators are also automatically members of the superordinate work groups.

An example will illustrate this:

- `Group A`
    - `Group A1`
    - `Group A2`
- `Group B`
    - `Group B1`

The implicit roles are as you would intuitively expect:

1. Members of work groups `Group A1` and `Group A2` are also members of work group `Group A` (see Figure 115).
2. Similarly, members of `Group B1` are also members of `Group B`.

3. An administrator of work group `Group A` can also administer `Group A1` and `Group A2` (see Figure 116).
4. An administrator of `Group B` can also administer `Group B1`.

The following figures show the implicit roles in the application.

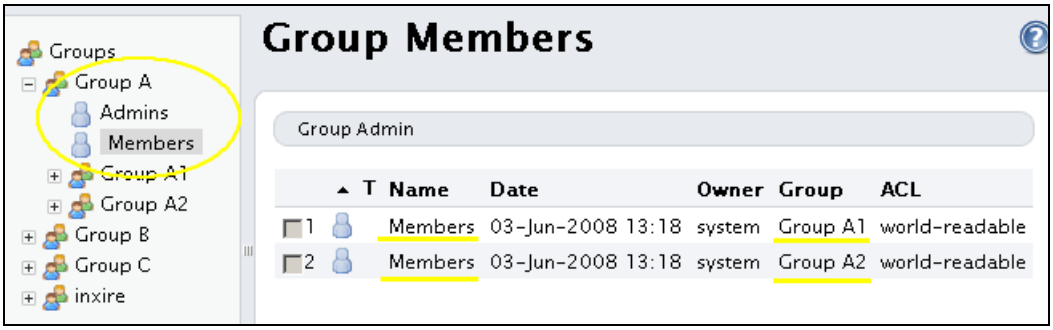


Figure 115: Implicit Members of a Work Group

Figure 116: Implicit Administrators of a Work Group

Note: For site-specific requirements, additional implicit role relationships can be set up, for example, all editors (role `Editors`) can be automatically entered as members (role `Members`).

6.4 Typical Tasks

You can carry out many administration tasks quickly and easily using the `Group Admin` menu (see Appendix 10.3.5). The following step-by-step instructions describe more complex tasks:

- Section 6.4.1: Creating a Work Group
- Section 6.4.2: Adding a User to a Work Group
- Section 6.4.3: Revoking Role Assignments
- Section 6.4.4: Removing a Role
- Section 6.4.5: Assigning a Subgroup to an Additional Work Group
- Section 6.4.6: Removing a Subgroup
- Section 6.4.7: Moving a Work Group

- Section 6.4.8: Renaming a Work Group
- Section 6.4.9: Deleting a Work Group
- Section 6.4.10: Checking Group Membership

6.4.1 Creating a Work Group

The following instructions describe the creation of a new work group using the example of work group `Demo 1`:

1. Open group administration (see Section 6.1).
2. In the navigation tree on the left, select the work group under which the new work group is to be created.

   In this example the work group `Demo 1` will be created under `Group B`.
3. Choose menu option `Group Admin > New Work Group`.

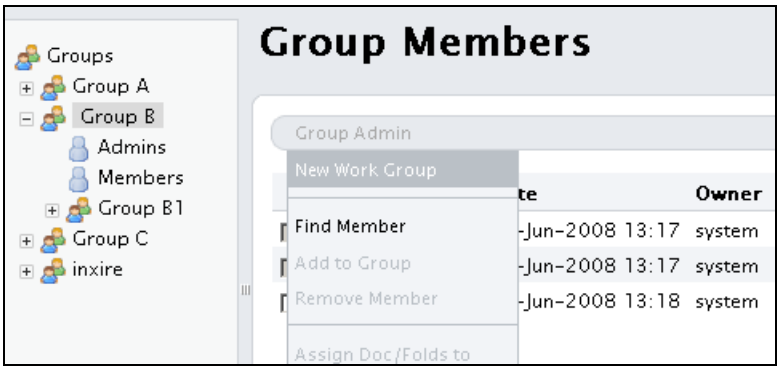


Figure 117: Creation of a Subordinate Group for "Group B"

A pop-up appears where you can enter the name:

Figure 118: Entering the Work Group Name

4. Enter the name of the work group (`Demo 1`) and click on `OK`.

The new work group is created and entered as a subgroup:

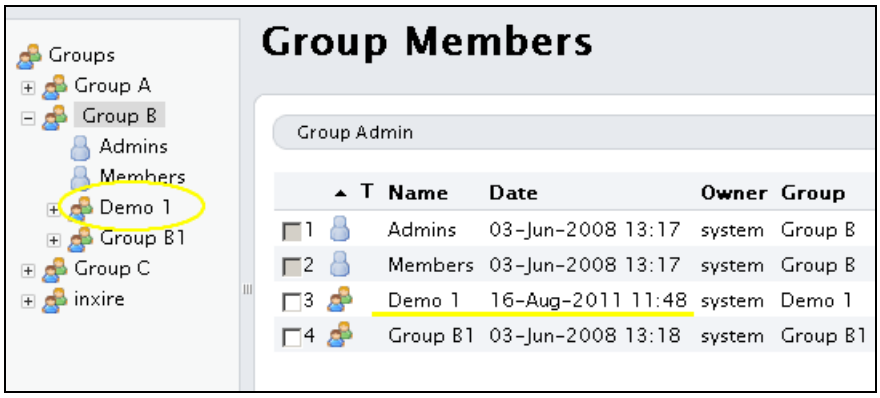


Figure 119: Subgroup "Demo 1" Is Created

In further steps you can define roles and users.

Note: Alternatively you can also find an existing work group and insert it as a subgroup (menu option `Group Admin > Find Member`).

6.4.2 Adding a User to a Work Group

Before you can add a user to a work group, you must decide which roles the user is to perform in this work group. You must assign at least one role to the user.

For a list of the available roles, see Section 6.1.2.

As an example, the roles `Members` (ordinary member) and `Moderators` (moderator) are assigned to user `scott` in work group `Demo 1`.

1. Open group administration (see Section 6.1).
2. In the navigation tree on the left, select the required work group (here: `Demo 1`).

   In the central window, the subgroups and all active roles are listed.
3. For each role that is missing in the work group, choose menu option `Group Admin > Find Member`.

   A search window opens in which you can search for the role (or a work group):

   a. Enter the search text, for example, "M", and press Enter.

   b. Select the role (click on the name, here: `Moderators`).

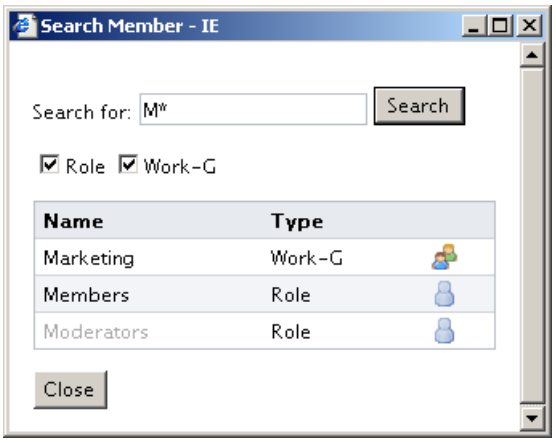


Figure 120: Inserting Role "Moderators"

The role is entered in the work group.

For information on the effective use of search windows, see Section 9.5.

4. You must now enter the user separately in each required role (here: `Members` and `Moderators`):

   a. Navigate to the role (click on the name).

   b. Choose `Group Admin > Find Member`.

      A search window opens in which you can search for users (and ordinary groups[8]).

   c. Enter the search text, for example, "s", and press Enter.

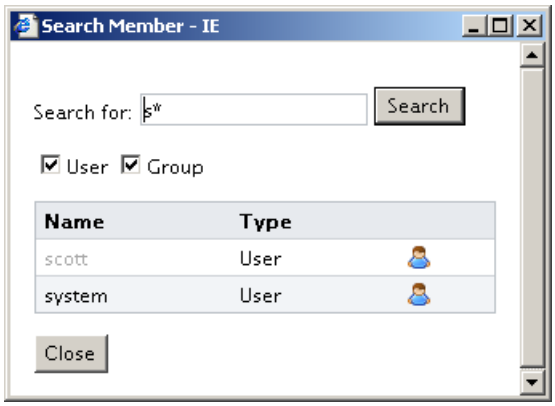


Figure 121: Selecting User scott

   d. Select the user (click on the name, here: `scott`).

The user is assigned the new role.

[8] These are not work groups but rather ordinary user groups (see Section 6.1.4).

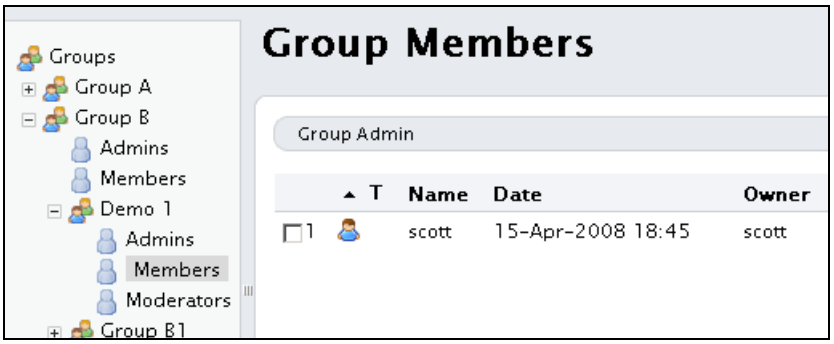


Figure 122: User scott Is a Member of Work Group "Demo 1"

Note: You can also assign a role in the work group to an ordinary group[8].

6.4.3 Revoking Role Assignments

As an example of removing a role assignment, we will revoke the role `Members` from user `scott` in work group `Demo 1`.

1. Open group administration (see Section 6.1).
2. In the navigation tree on the left, navigate to the role (here `Members` in work group `Demo 1`).
3. In the list on the right, flag the user (here: `scott`) with a check mark and choose menu option `Group Admin > Remove Member`:

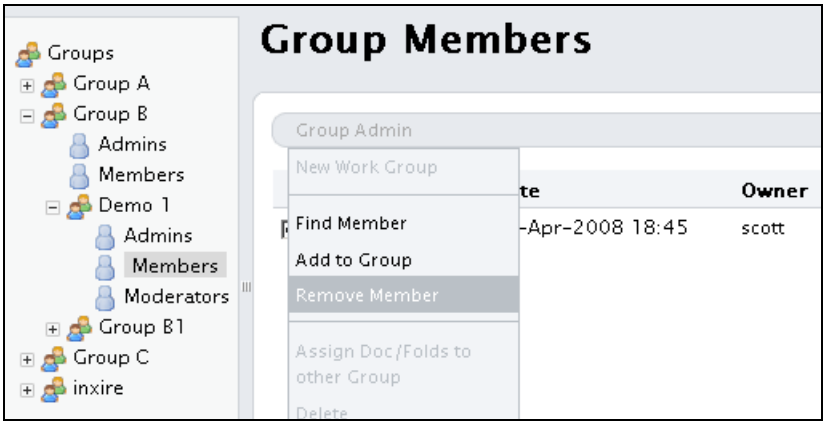


Figure 123: Revoking the "Members" Role From User "scott"

The user's role is revoked.

Note: The user possibly has other roles in the work group. These role assignments remain intact.

Note: The user is not deleted but remains in the system. It is not possible to delete users using the inxire ECM interface (see "Administration Manual inxire ECM").

6.4.4 Removing a Role

Before you can use a role in a work group, you must first activate the role. Then you can assign the role to users (see Section 6.4.2). Of course, you can also revoke roles from users (see Section 6.4.3). However it is not possible to undo the activation of a role.

As an alternative, we recommend that you revoke the role from all users to which it is assigned (see Section 6.4.3).

6.4.5 Assigning a Subgroup to an Additional Work Group

Subordinate work groups, which are currently in the member list, can be directly assigned to a further work group without using the search dialog.

For example, work group `Group C`, a top-level group, is added to work group `Demo 1`.

1. Open group administration (see Section 6.1).
2. In the navigation tree on the left, navigate to the superordinate group (here the origin of the group hierarchy: `Groups`).
3. In the list on the right, flag the subgroup with a check mark (here: `Group C`) and choose menu option `Group Admin > Add to Group`:

Figure 124: Select "Group C" and Choose Menu Option "Add to Group"

A selection dialog appears for the new superordinate work group:

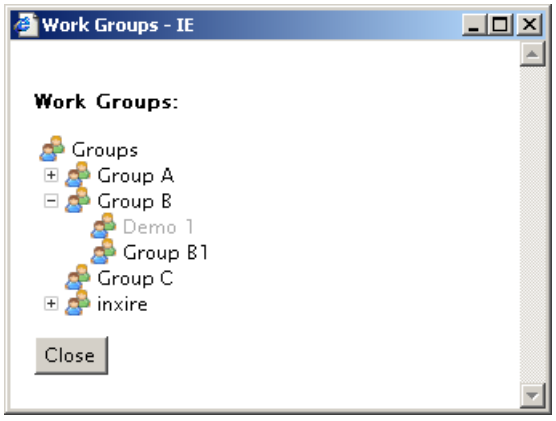


Figure 125: Pop-Up with Work Group Hierarchy

4. Select the work group (click on the name, here: `Demo 1`)

   Note: You may first have to open closed areas by clicking on the plus sign (see Section 2.4.2.4).

   The selection window is closed and the subgroup (`Group C`) is also assigned to the new work group (here for `Demo 1`).

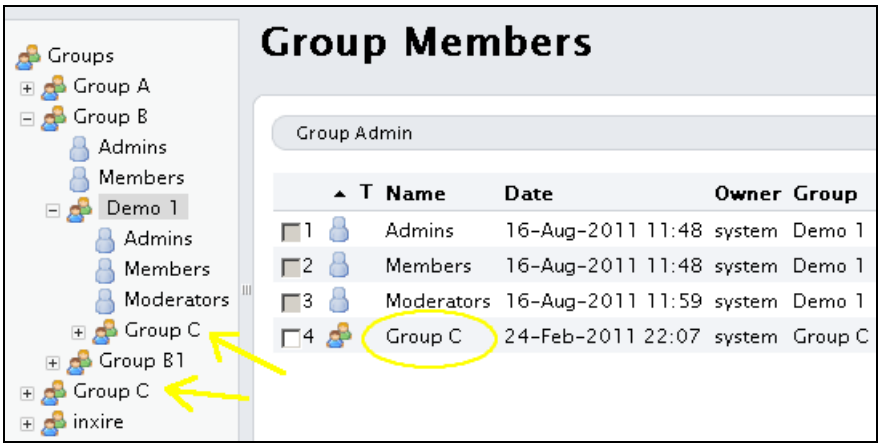


Figure 126: Work Group "Group C" Added to Work Group "Demo 1"

Note: For this action, administration rights are required for both groups, in the example `Group C` and `Demo 1`.

Note: Similarly, you can assign an additional role to a user. This role can be in a different work group.

6.4.6 Removing a Subgroup

You can remove a subordinate work group from the member list. The work group remains in the system and can, for example, be inserted later at a different location (see also Section 6.4.7).

The example in the following instructions removes the work group `Group C` from work group `Demo 1`:

1. Open group administration (see Section 6.1).
2. In the navigation tree on the left, navigate to the superordinate group (here: `Demo 1`).
3. In the list on the right, flag the subgroup with a check mark (here: `Group C`) and choose menu option `Group Admin > Remove Member`:

Figure 127: Removing Subgroup "Group C" From Work Group "Demo 1"

Work group (`Group C`) is removed from the superordinate work group (`Demo 1`).

Note: The work group remains in the system even if it is no longer contained in another work group. To delete a work group definitively, choose menu option `Group Admin > Delete` (see Section 6.4.9).

Caution: The administrators of the superordinate work group (here: `Demo 1`) lose all rights for the subgroup (here: `Group C`). If you only wish to move a work group, we recommend therefore first entering it in the new work group and only then removing it from the old work group (see Section 6.4.7).

6.4.7 Moving a Work Group

If you wish to move a work group within the group hierarchy, you should first enter it in the new superordinate work group and then remove it from the old work group.

Note: In principle, you can also remove the subgroup from the old work group first. However, it is then possible that you will not have the rights to enter the subgroup in the new work group (see Section 6.3).

The steps in detail (in the example, work group `Group C` is moved to `Demo 1`):

1. Open group administration (see Section 6.1).
2. In the navigation tree on the left, navigate to the superordinate work group (here the origin of the group hierarchy: `Groups`):

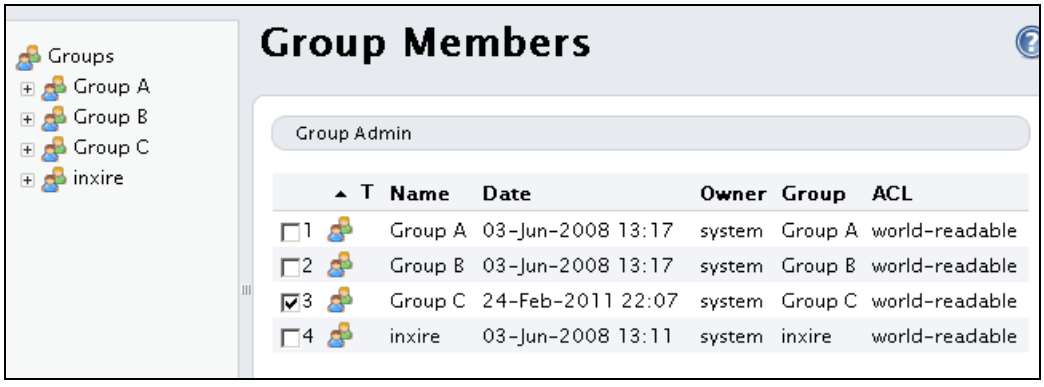


Figure 128: Top-Level Work Group "Group C"

3. Assign the subgroup to the new work group (see Section 6.4.5):

    a. In the list on the right, flag the subgroup with a check mark (here: `Group C`) and choose menu option `Group Admin > Add to Group`.

    A selection dialog appears for the new superordinate work group (see Figure 125).

    b. Select the work group (click on the name, here: `Demo 1`).

    The subgroup is assigned to the new work group.

    Note: You may first have to open closed areas by clicking on the plus sign (see Section 2.4.2.4).

4. Remove the subgroup from the old work group (see Section 6.4.6):

    a. In the list on the right, flag the subgroup again with a check mark (`Group C`) and choose menu option `Group Admin > Remove Member`.

    Work group (`Group C`) is removed from the member list.

Note: You require administration rights for the old and the new superordinate work group.

6.4.8 Renaming a Work Group

Work groups are renamed in the properties dialog. For this, you require administration rights for the work group.

To rename a work group, you open the properties dialog (see Section 6.4.10), modify the name of the work group and confirm the change with `Submit`.

6.4.9 Deleting a Work Group

A work group can only be deleted if it contains no subgroups and if no documents, folders, or other objects are assigned to it (see Section 3.1.3).

The following instructions assume that you do not wish to delete the subgroups and assigned contents but rather that you wish to assign them to a replacement group.

Ensure that you can administer all the relevant work groups; especially the superordinate work group and the replacement groups.

As an example of deleting a work group, we will remove work group `Demo 1` from the system:

1. Open group administration (see Section 6.1).
2. Transfer all documents, folders and other objects to a replacement group:
   a. In the navigation tree on the left, navigate to the **superordinate** work group (here: `Group B`).

      In the central window, all subgroups and active roles are listed, including the work group that is to be deleted (`Demo 1`):

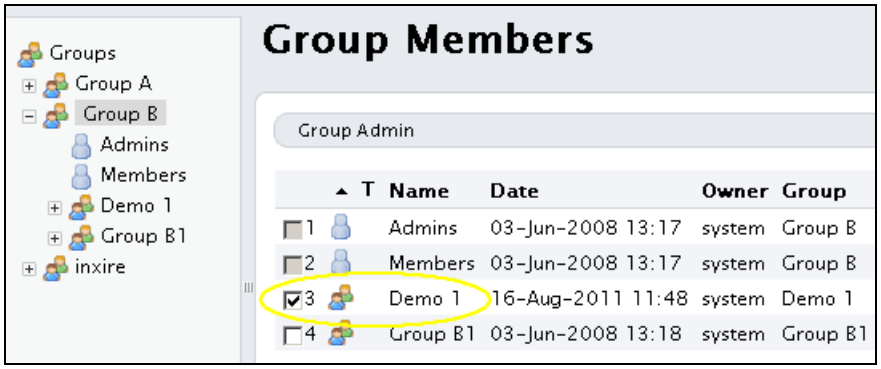


Figure 129: Deleting Work Group "Demo 1"

      Note: If the work group is incorporated in the group hierarchy at several points, you can select any of the superordinate work groups.

   b. Flag the required work group (`Demo 1`) with a check mark and choose menu option `Group Admin > Assign Doc/Folds to Other Group`.

      A pop-up opens with the group hierarchy:

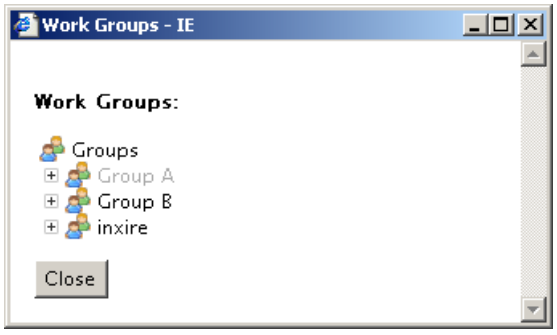


Figure 130: Selecting Replacement Group "Group A"

   c. Select the replacement group here, that is, the work group to which all documents, folders and other objects are to be assigned (click on the name, here: `Group A`).

      Note: Open any closed areas by clicking on the plus sign.

      The contents are assigned to the replacement group.

3. Assign all subgroups (if any exist) to a different work group:

   a. Navigate to the work group (click on the name, here `Demo 1`).

      In the central window, all subgroups and active roles are listed:

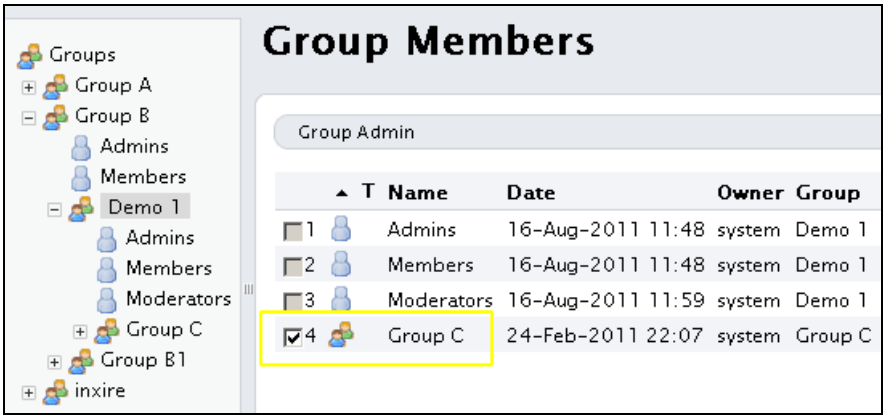


      Figure 131: Moving Subgroups

   b. Flag all subgroups and choose menu option `Group Admin > Add to Group`.

      A pop-up opens with the group hierarchy (see Figure 130).

   c. Select the replacement group to which the subgroups are to be moved (click on the name, here: `Group A`).

      The subgroups are assigned to the replacement group.

   d. Flag the subgroups again and choose `Group Admin > Remove Member`.

      The subgroups are removed from the member list.

4. Now you can delete the work group from the system. In the navigation tree on the left, click again on the **superordinate** work group.

5. Flag the work group to be deleted in the list (`Demo 1`) and choose menu option `Group Admin > Delete`.

   The work group is deleted from the system.

6.4.10 Checking Group Membership

Do you need to find a user or a work group in the group hierarchy? Then use the menu option `Group Admin > Search Group/User`. This allows you to display the properties of each user and each group. You can also see exactly where the user or group is incorporated into the group hierarchy.

This is illustrated here with user `scott` as an example:

1. Open group administration (see Section 6.1).

2. Choose menu option `Group Admin > Search Group/User`.

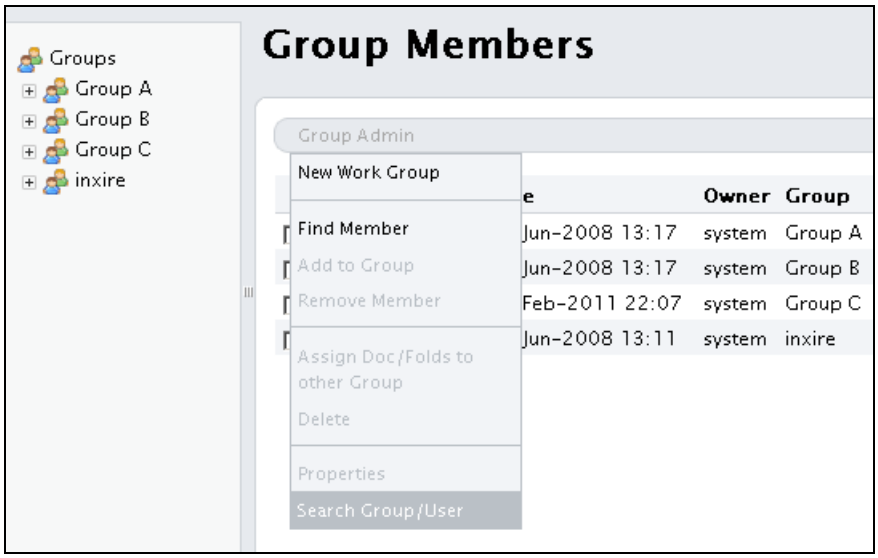


Figure 132: Search Group/User

A pop-up opens in which you can search for a user or a group.

3. Enter a search text, here for example, "s", and press Enter:

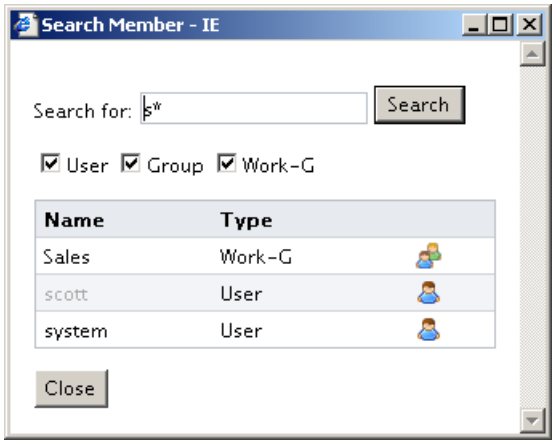


Figure 133: Searching for a Group or User

Note: The check boxes enable the specific search for users, ordinary groups[9] or work groups (`Work-G`).

4. Click on the name of the user (here `scott`).

   The properties dialog opens (see Section 3.3):

[9] These are not work groups but rather ordinary user groups (see Section 6.1.4).

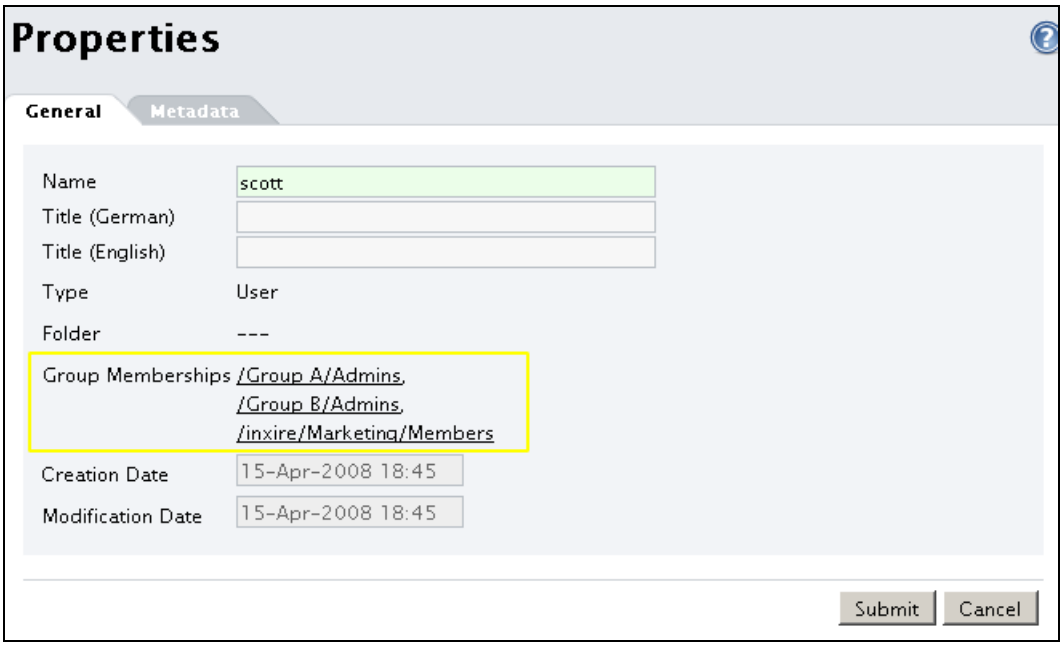


Figure 134: Properties of User scott

Under `Group Memberships`, you can see the user's work groups and roles (`scott` is an administrator in work groups `Group A` and `Group B` and an ordinary member of work group `Marketing`).

Note: Only the user itself or a system administrator can make changes here.

5. Exit the dialog using the button `Cancel` (if you have not made any changes).

Note: Similarly, you can display the group memberships of ordinary groups or work groups.

Note: Alternatively, you can access the properties dialog using menu option `Group Admin > Properties` if you have already selected an entry in the member list.

7 Access Control

7.1 Introduction

Access control regulates access to the entries in the Folders (see Chapter 3). For each entry, a list of the authorized persons and their access privileges is defined, the access control list. Documents and folders can only be found and viewed by users with read privileges. Write privileges are required to make changes.

As a rule, the access privileges are assigned automatically by the system so the normal user does not have to deal with these. For this reason, they are not displayed in the beginner mode of the editorial view nor in the portal. If required, experienced users can switch to expert mode (see Section 2.4.1.2) to set the access privileges manually.

7.1.1 Work Groups

Work groups are a significant aspect of access control (see Section 6.1.1). Rather than assigning privileges for numerous documents and folders to each individual user, the users are split into work groups and the access privileges are then assigned to the work groups. This greatly simplifies the administration of user privileges.

The work groups usually map the hierarchical structure of the company. In addition, project teams and ad-hoc task forces are frequently created as work groups.

7.1.2 Roles

Within a work group, a role (see Section 6.1.2) is always assigned to the user, for example, as a member, administrator or editor. A user can hold multiple roles simultaneously.

Access privileges are assigned exclusively to the roles and not directly to the work group. We say, for example, the editors of work group "Management" can edit the document "Annual Report".

Work groups and roles are maintained in group administration (see Chapter 6).

7.1.3 Properties Dialog

The access privileges for an entry in the Folders are maintained in the properties dialog (see Section 3.3). This applies to all types of entries whether they are documents, folders or special objects (see Section 3.1.3).

Under the `Security` tab (only visible in expert mode, see Section 2.4.1.2) you can find the following settings:

- **Owner**

  The entry is currently assigned to this user. The owner can see the entry at any time and can make changes as required.

- **Work Group**

  The work group determines which persons have privileges. The following settings define which access privileges the individual roles in the work group possess.

- **Access Control**

  Here you can select one of the predefined access control lists (see Section 7.3).

- **Extended**

  Under `Extended...` there is a list of individual privileges (see Section 7.2.2) that have additionally been assigned to individual users or to roles in other work groups. This facility is only used in exceptional cases.

For information on using the screen, see Section 3.3.5. For a step-by-step guide to setting the access privileges, see Section 3.5.17.

7.2 Basic Concept

For each entry in the Folders (see Chapter 3), an access control list (ACL) is defined. This consists of a list of authorized persons and their privileges.

The following example will clarify this.

Authorized Person	Privileges
User A	Write
User B	Read
User C	Read, delete

Table 25: Example of an Access Control List (ACL)

User A is allowed to write, that is, change the document or folder in any way.

User B can only read the document or the contents of the folder, whereas user C can both read and delete the entry.

Note: Two users have total privileges independent of the access control list: the owner and the system administrator.

7.2.1 Authorized Persons

Individual users or roles of a work group can become authorized persons (see Section 6.1.2).

Alternatively, privileges can be assigned to all users without restrictions.

7.2.2 Privileges

The following privileges are available per default:

Privilege	Description
Read	Read privileges are required in order to find a document, a folder or other object, and to read the content.
Write	General write privileges enable the user to make any changes as required.
Add Item	The Add Item privilege enables you to upload new contents here. In the case of a folder, the user can create documents and subfolders. For wikis, forums, document shares and task lists, privileges are granted to create new articles, forum posts, documents and tasks (see Chapter 5). Making changes to the entry itself is not permitted.
Modify Properties	With this privilege, you can change all properties, also the contents of documents and folders. However, you cannot delete the entry and you cannot change the access control settings.
Delete	This authorizes you to delete the entry.

Table 26: Individual Privileges Available in inxire ECM

7.3 Standard ACLs

To simplify the assignment of access rights, predefined access control lists (standard ACLs) have been defined.

As a rule, it is sufficient to append a work group and one of the following standard ACLs to each entry in the Folders:

Name of the ACL	Grantee[10]	Privileges
private	-- no individual privileges -- (only the owner sees the entry and can change it)	
readable	All users	Read
writable	All users	Write
open	All users	Add Item
group-private	Admins	Write
member-readable	Members	Read
	Admins	Write
member-writable	Members	Write
	Admins	Write
member-writable, world-readable	All users	Read
	Members	Write
	Admins	Write
open to members	Members	Add Item
	Admins	Write
open to members,	All users	Read

[10] `Admins` (administrators), `Members`, `Editors` and `Reviewers` refer to the roles within the assigned work group (see Section 6.1.2).

Name of the ACL	Grantee[10]	Privileges
world-readable	Members	Add Item
	Admins	Write
editor-readable	Editors	Read
	Admins	Write
editor-, member-, reviewer-readable	Members	Read
	Reviewers	Read
	Editors	Read
	Admins	Write
editor-, world-readable (equivalent to world-readable)	All users	Read
	Editors	Read
	Admins	Write
world-readable	All users	Read
	Admins	Write
world-open	All users	Add Item
	Admins	Write

Table 27: Standard ACLs of inxire ECM

Hint: Access control lists that have the word "open" in the name grant the privilege `Add Item`. These are frequently used with folders and special objects such as wikis or forums.

Note: The list of standard ACLs can differ in your installation. Consult your system administrator.

For a step-by-step guide to setting the access privileges, see Section 3.5.17.

8 Workflow Management

8.1 Introduction

Processes are work sequences guided by the system in which usually several persons are involved. Workflow management regulates and coordinates these processes, allocates write privileges to the responsible persons, sends informational e-mails and carries out various checks.

Depending on the task, different types of processes are available, per default a publication process and a reminder process. The publication process is an approval process for creating and updating portal pages. The reminder process sends a reminder e-mail at the designated time.

8.1.1 Why Use Processes?

There are various reasons for choosing a process instead of normal editing. Here are just some:

- Lack of access privileges prevents direct editing (see Section 3.1.2).
- Cooperation among several people must be coordinated.
- Time-critical work steps require automatic execution.
- The work must be logged and archived - audit-compliant.

8.1.2 Process Types

As standard, the following processes are available:

- **Publication Process**

  In this process (see Section 8.5) you can create new portal pages or change existing ones. The changes must be approved by an editor. The editor can ask one or more reviewers for their opinion.

- **Review Process**

  This is not an independent process but part of the publication process. A separate review process is started for each reviewer.

- **Reminder Process**

  The reminder process (see Section 8.6) is a simple time-controlled process which sends a reminder e-mail to the initiator at a predefined time. Other persons are not involved.

Note: Not all of the process types described here are available in every installation. Additional processes may also be installed.

8.1.3 Work List

The work list is the access point to workflow management. Here you can find all pending work, that is, processes for which you are currently responsible. Also listed are those processes which you have started. This ensures that you always have up-to-date information.

Note: With sufficient privileges, you can also view the processes of other users or archived processes (see Section 8.7.5).

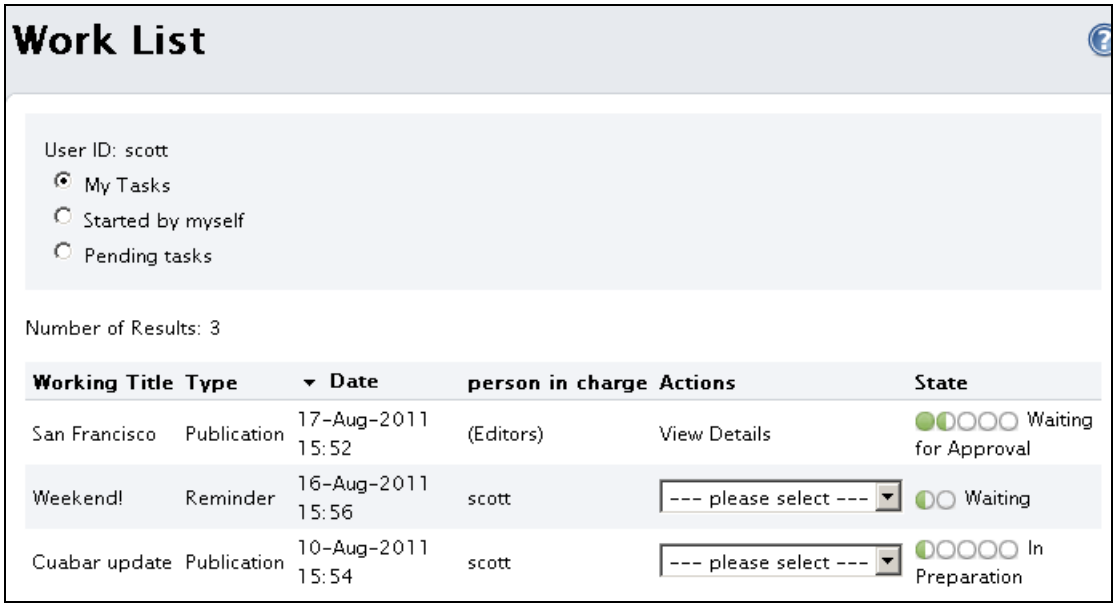


Figure 135: Work List of User scott

From the work list, one click takes you to the work folder of the process (column `Working Title`) or to the detailed view (column `State`). Or you can forward the process to the next responsible person (column `Actions`).

For a detailed description of the work list, see Section 8.3.

8.1.4 Archive

Completed processes are shown for some time in the work list before they are archived.

You can also view archived processes using the work list; for instructions, see Section 8.7.5.

8.2 Daily Work

8.2.1 Starting a Process

Processes are started either automatically or manually. For example, the publication process starts automatically if you wish to edit an entry in the layout preview of the file manager (see Section 3.2.3) and you do not have the required privileges. However, you can start the process manually using the menu option `Edit > Apply for Update` (instructions in Section 8.7.2).

Depending on the type of the process, other rules may apply. You can find details in the documentation for each process type (see Section 8.5).

8.2.2 Responsible Person

At all times, there is a responsible person defined for an ongoing process. This can be either an individual user or a role in a work group (that is, possibly multiple users, see Section 6.1.2).

The responsible person is displayed in the work list in column `Person in Charge` or `Current Actor` (see Section 8.3.3).

If you are the person currently responsible for a process, you must carry out the required tasks (see Section 8.2.4) and then forward the process (see Section 8.3.4).

Suppose, for example, you have started a publication process. Then your first task is to create new portal contents or to review existing contents. For this, you have all the functions of the file manager at your disposal (see Section 3.2.5). Then you forward your work to an editor for approval (see Section 8.7.1).

8.2.3 Work Folder

Processes are frequently used to handle documents, folders and other contents of the content repository (see Chapter 3). For example, in the publication process the contents of the portal, which are located under folder `Web Pages`, are edited (the name can vary, see Section 4.1.1).

In the process, you do not work with original data but with copies. Either you have a temporary work folder in the editorial working area (see Section 3.1.1) or you work directly in the target folder with working copies that are appended to the originals (revision mode, see Section 3.2.5). The latter has the advantage that you do not need to change your position in the Folders.

The type of the work folder is determined by the process. For example, the authors and editors in the publication process can use revision mode whereas the reviewers are assigned a temporary folder in the editorial area (see Section 8.5.6).

In any case, you can access your work folder quickly and easily by opening the work list and clicking on the working title of the process. The file manager opens. As a reminder, a link to the process is shown to the right of the title, for example, "View Process" (see Figure 136).

8.2.4 Task Description

In the file manager, a sequence of tasks is defined for the person currently responsible.

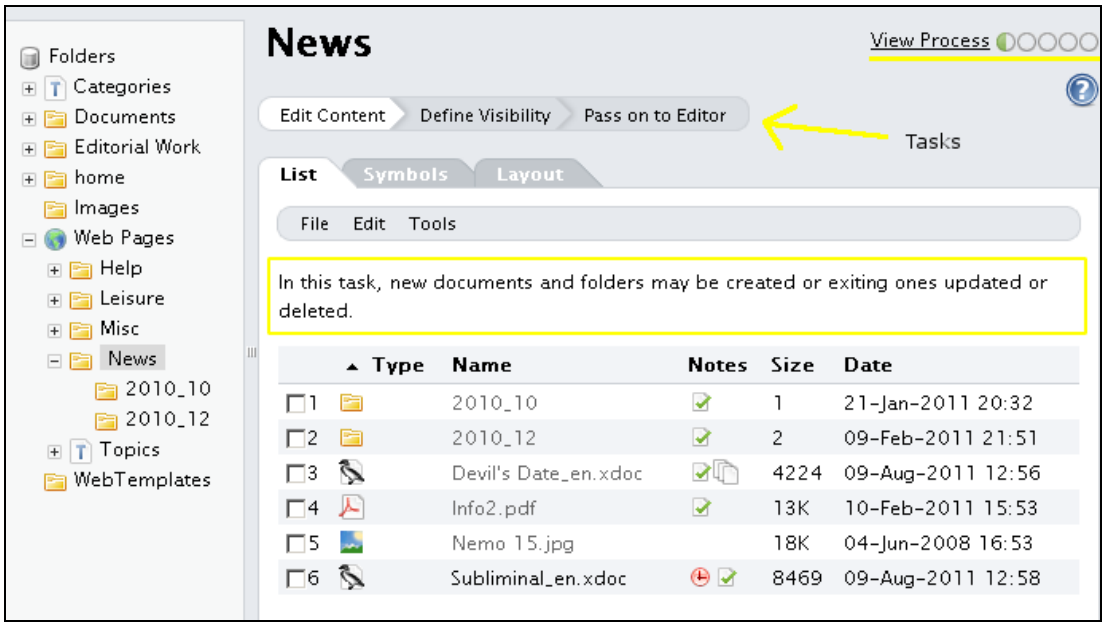


Figure 136: Task Description in the File Manager

In the figure above, you can see, for example, the tasks of an author in the publication process (directly under the page title `News`). A brief description of the current task is also shown under the menu bar.

You should carry out the tasks in the given sequence. In each case, an appropriate screen opens. On the final screen (`Pass On to Editor`), you can forward the process to the next responsible person, in this case to an editor for a decision (see Section 8.7.1).

8.3 Work List

The work list is the pivotal point of the workflow management system. Here you can find information on pending work or view the state of current processes, for example, checking the approval status of your latest article. Filter and search functions enable you to search specifically for individual entries. With the appropriate privileges, you can even open the work lists of other users.

The work list is an important part of the editorial view and can be accessed using the main navigation menu (see Section 2.4).

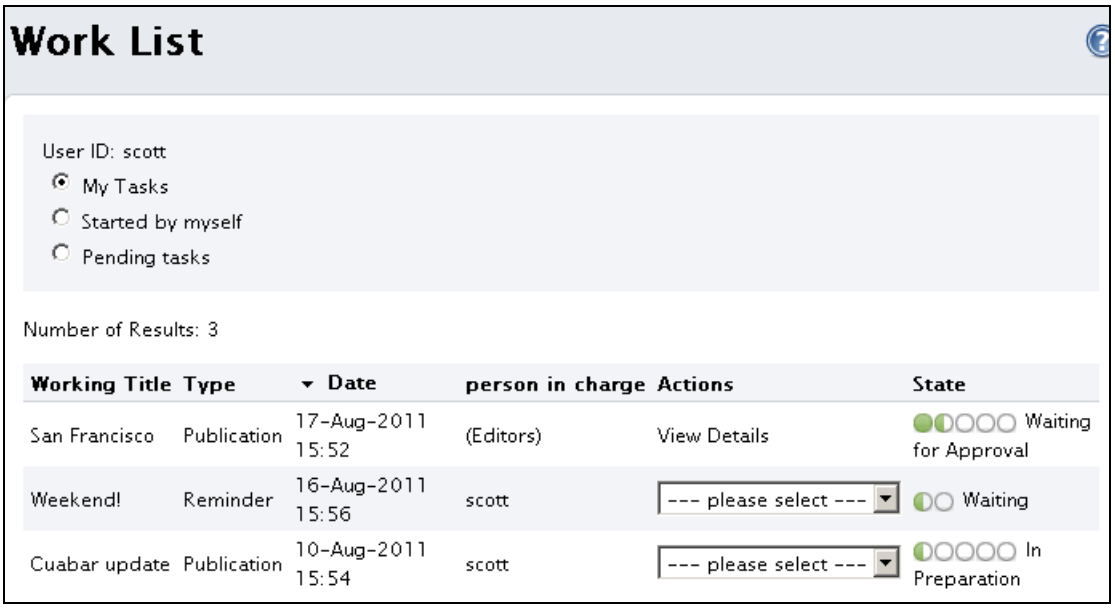


Figure 137: Work List of User scott (Beginner Mode)

8.3.1 Overview

The work list has a simple structure. The search and filter functions are at the top. The processes are listed below these.

Each line shows exactly one process. By clicking on the `Working Title`, you open the work folder (if one exists, see Section 8.2.3); by clicking on `State`, you open the detail view (see Section 8.4). With sufficient privileges, you can use an editing menu in the `Actions` column.

Below, each of the screen elements is described.

8.3.2 Search and Filter

Per default, all the processes that you have started, or for which you are currently responsible, are displayed. Using the search and filter functions, you can restrict or extend the list.

You can only see a simple selection list? Then you are working in beginner mode (see Section 2.4.1.2) and you have the following options (see Figure 137):

- `My Tasks`

  All processes that you have started yourself or for which you are currently responsible.

- `Started by Myself`

  Only those processes that you have started yourself.

- Pending Tasks

  Only processes for which you are currently responsible. Responsibility has been assigned to you either directly or indirectly by means of a role (see Section 6.1.2) which you hold.

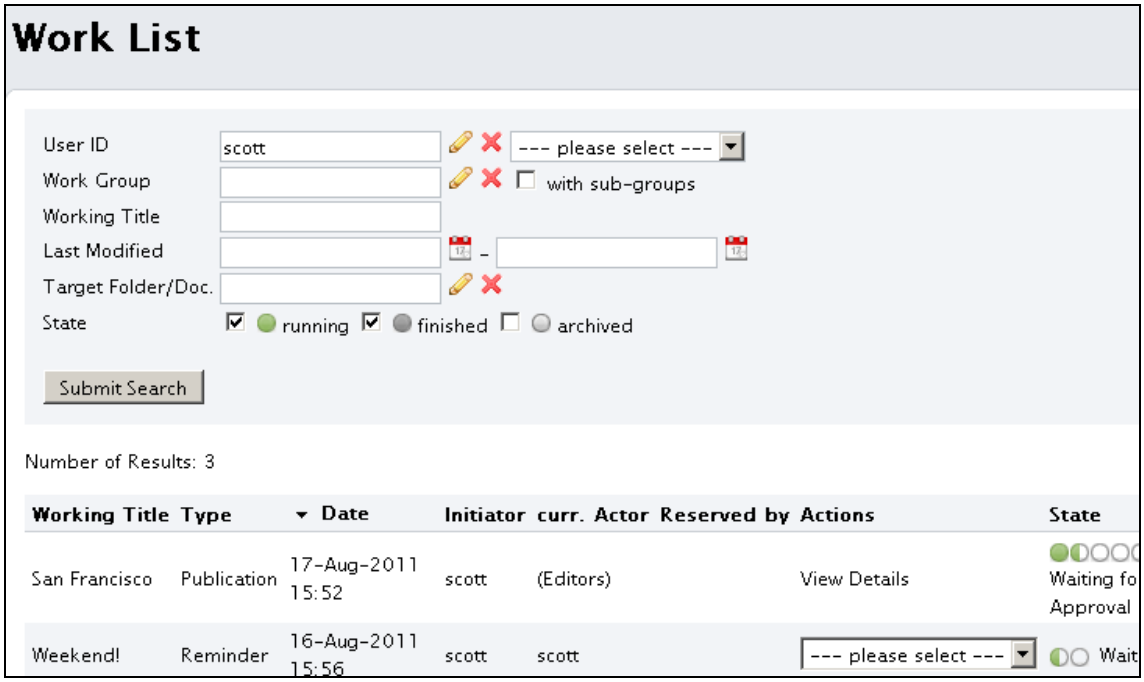


Figure 138: Work List in Expert Mode

In expert mode (see Section 2.4.1.2), you have more options:

- User ID

  If you select another user (click on the pencil), you can view that user's work list. However, you only see the processes for which you have read privileges (see Section 7.2.2). Alternatively, you can clear the field (symbol) and use one of the following search options.

- Work Group

  Only the processes of the selected work group (see Section 6.1.1) are displayed. You can choose to include subgroups (check box).

- Working Title

  Here you can carry out a specific search in the working title. Enter a word of the title. You can use the wildcards * and ? (word search, see Section 9.1.2).

- Last Modified

  Date of the last change to the process. The entry fields define the start and end dates for the search.

- `Target Folders/Doc.`

  You use these to filter by the folder or document which the process is dealing with. In the publication process (see Section 8.5), for example, this is the folder in which contents are to be published.

- `State`

  You can select running, finished and archived processes. System administrators also have the option to filter suspended or faulty processes.

Note: Some fields cannot be edited directly. Click on the symbol (edit). A selection dialog opens. Using the symbol (clear), you can remove the current value.

8.3.3 What Is Displayed?

A short explanation of the table columns.

Column	Meaning
Working Title	Each process has a working title. It is defined by the initiator. Note: By clicking on the working title, you open the work folder (if one exists, see Section 8.2.3).
Type	Type of process Per default, a publication process and a reminder process are available (see Section 8.1.2).
Date	Date of the last change (last action).
Initiator	User who started the process (only visible in expert mode).
curr. Actor	The user who is currently responsible (see Section 8.2.2, only visible in expert mode). For system-controlled states, for example, time-controlled steps, user `system` is displayed. Note: In some cases, the responsible role (see Section 6.1.2) is shown in parentheses.

Column	Meaning
Reserved by	User who reserved the process (only visible in expert mode). See action `Reserve Process`.
Person in Charge	In beginner mode, this column combines the two columns `curr. Actor` and `Reserved by`.
Actions	Drop-down menu with editing functions, for example, to forward the process to the next responsible person (see following section). Appears only if you have sufficient privileges.
State	Degree of completion as a graphic, followed by a descriptive text. The color of the dots indicate the rough states of the process as `running` (green), `suspended` (yellow), `error` (red), `finished` (gray) and `archived` (light gray). Note: This column has a link to the process details (see Section 8.4).

Table 28: Columns of the Work List

8.3.4 Actions

As the person currently responsible or as an administrator, you can edit a process. This means, on the one hand, that you can change the data in the work folder (if one exists, see Section 8.2.3). On the other hand, you can change the process itself, for example, complete it, or forward it to another user.

The necessary functions are in the column `Actions`. Depending on the type of the process and its state, different actions are possible. You can find details in the documentation for each process type (see Section 8.5).

Some general actions are also available:

Action	Description
View Details	This link opens the process details with information on the work folder, target directory and history (see Section 8.4).

Action	Description
Reserve Process	The process is reserved exclusively for you for editing.
Cancel Reserve	The reservation is canceled.
Suspend Process	The process is paused temporarily (only visible for system administrators).
Resume Process	A suspended process is resumed (only visible for system administrators).
Cancel Process	The process is terminated abnormally (only visible for system administrators).

Table 29: General Actions in the Work List

Note: Only actions appropriate to the situation are provided.

Note: In some cases, you must reserve a process before you can carry out other actions.

8.4 Process Details

In the work list you cannot see all the details of a process. If, for example, you wish to know the progress to date (history), you need the process details.

You open these from the work list by clicking on the column `State`. In the work folder, you can follow the process link at the top of the page ("View Process ", see Figure 136).

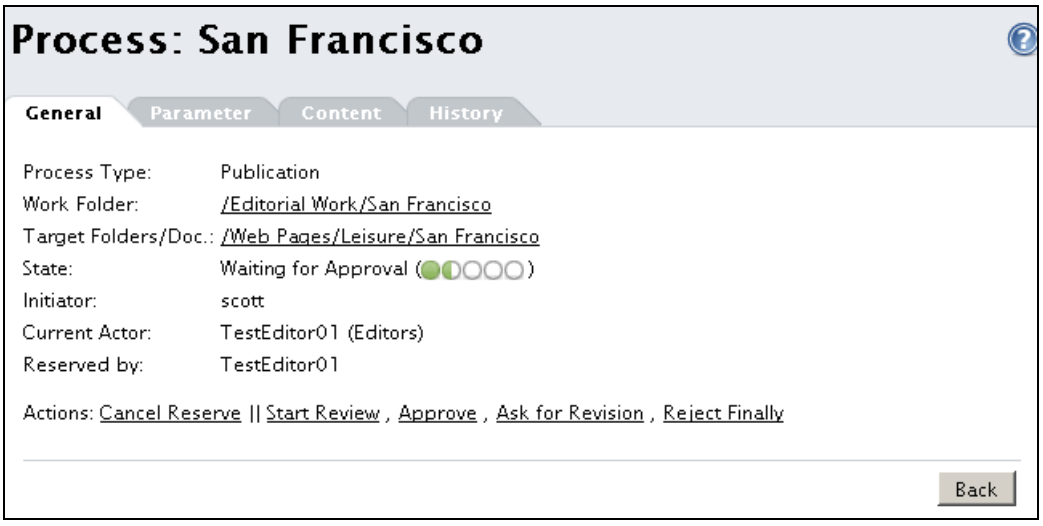


Figure 139: General Data of a Process

8.4.1 Overview

The process details are split over three or four screens (depending on the process) and you can switch between these using the tabs:

- `General`

  Here you can find general information on the type of the process, on the work and target folders and on the current state.

  The user who is currently responsible or an administrator can also call editing functions, that is, carry out one of the `Actions` provided (see Section 8.3.4).

- `Parameter`

  This screen displays all attributes of the process which have been defined implicitly or explicitly by the users. It provides the experienced user with useful details.

- `Content` (optional)

  The `Content` screen is only shown if the process uses revision mode (see Section 8.2.3). All new, changed or deleted documents and folders are listed here.

- `History`

  Here you can find a protocol of the actions to date with the users' comments.

The following sections contain detailed descriptions of the individual screens.

8.4.2 Screen: General

In Figure 139 you can see the general data of a process:

- This is a publication process (`Process Type`), which is currently "Waiting for Approval" (see Section 8.5.1), that is, it has been submitted to an editor for assessment.
- The process was initiated by user `scott` (author) and is currently the responsibility of the editors (role `Editors`, see Section 6.1.2). One of the editors (`TestEditor01`) has reserved it for editing.
- The last line shows the possible actions (see Section 8.3.4) which are only available to an authorized user (here: `TestEditor01`).

The meaning of the different fields:

Attribute	Description
Process Type	Type of process (see Section 8.1.2)
Primary Process (not in the figure)	The primary process, if this is not an independent process but rather a subprocess. Example: In the publication process, a subprocess is started per default for each reviewer (review process, see Section 8.5.7).
Subprocesses (not in the figure)	The subprocesses of this process, if any exist
Work Folder (assigned object)	Temporary folder in the editorial working area (see Section 3.1.1); optional. Note: In the publication process this contains only the reviewer's data; you can find the work folder of the authors and editors under `Target Folders/Doc`.
Target Folders/Doc.	Folders or documents which the process deals with. Note: In the publication process, this is the folder in which the contents are to be published, that is, the work folder of the authors and editors.
State	Description of the current status; in parentheses the degree of completion as a graphic. This field corresponds to the column `State` in the work list (see Table 28).
Initiator	User who started the process.
Current Actor	The user who is currently responsible (see Section 8.2.2). For system-controlled states, user `system` is displayed. Note: In some cases, the responsible role (see Section 6.1.2) is shown in parentheses.
Reserved by	User who reserved the process; optional. See action `Reserve Process`.

Attribute	Description
Actions	List of editing functions, for example, to forward the process to the next responsible person (see Section 8.3.4). Appears only if you have sufficient privileges.

Table 30: General Attributes of a Process

8.4.3 Screen: Parameter

On the `Parameter` screen, all attributes of the process which have been defined implicitly or explicitly by the users are displayed.

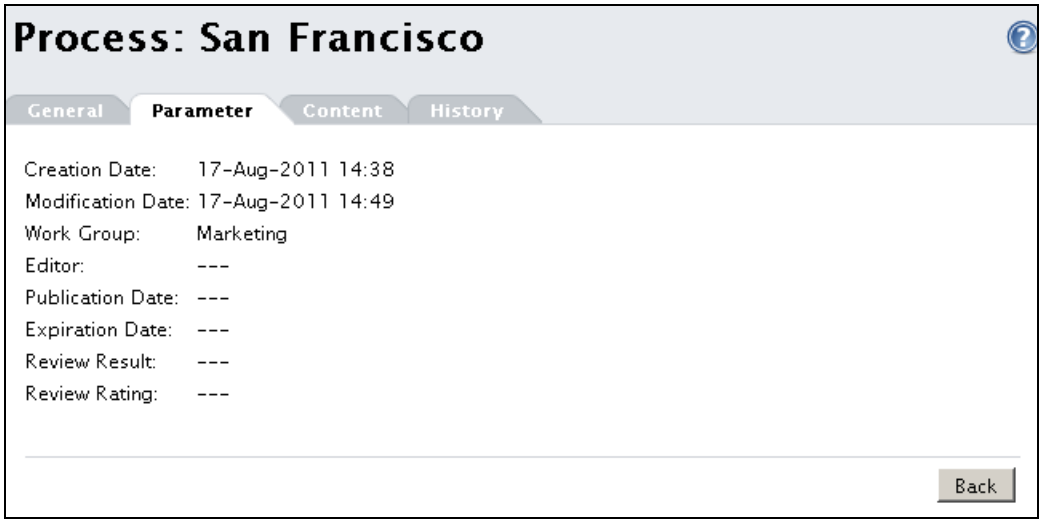


Figure 140: Parameters of a Publication Process

The first three parameters are always present:

- `Creation Date`

  The process was started at this time.

- `Modification Date`

  Date of the last change (last action).

- `Work Group`

  The process is assigned to this work group. Some process types, such as the publication process, are always tied to a work group. The editors of this work group (role `Editors`) approve publication.

The other parameters vary depending on the type of process (the figure shows a publication process, see Section 8.5).

8.4.4 Screen: Content

The `Content` screen is only shown if the process uses revision mode (see Section 8.2.3), for example, for a publication process.

Similar to a search results list, documents, folders and other contents, which have been changed in the process, are listed.

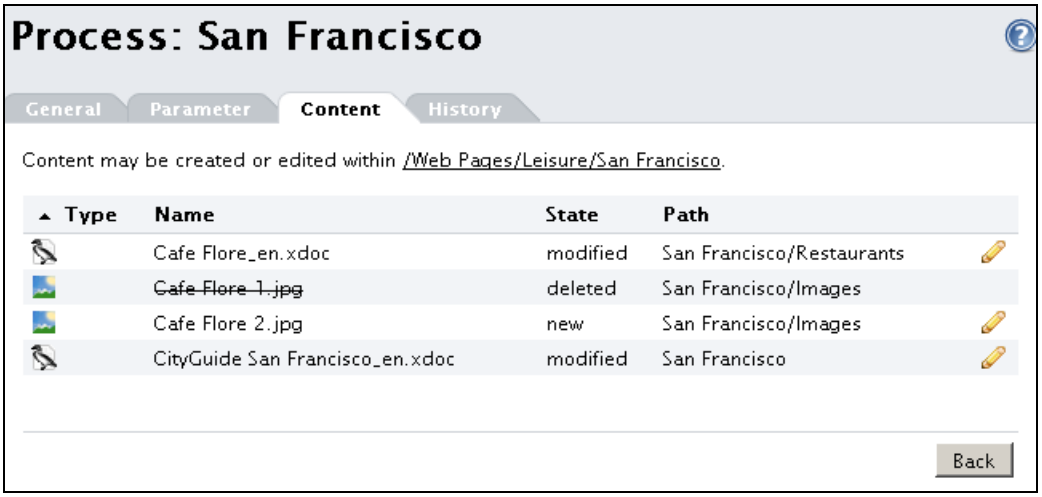


Figure 141: Contents Changed in the Publication Process

The figure above displays the following information:

- Target directory is the folder `/Web Pages/Leisure/San Francisco`. By clicking on the path, you open the folder in revision mode (see Section 3.2.5).
- The articles "Cafe Flore_en.xdoc" and "CityGuide San Francisco_en.xdoc" were updated (see column `State`).
- The image "Cafe Flore 1.jpg" was deleted and replaced by image "Cafe Flore 2.jpg" (in subfolder `San Francisco/Images`).

Note: The pencil opens the entry in the properties dialog (see Section 3.3). By clicking on a name or path, you access the storage folder (revision mode, see Section 3.2.5). There you can restore deleted contents, for example.

8.4.5 Screen: History

On the `History` screen you can find a protocol of all actions to date with the comments of the users.

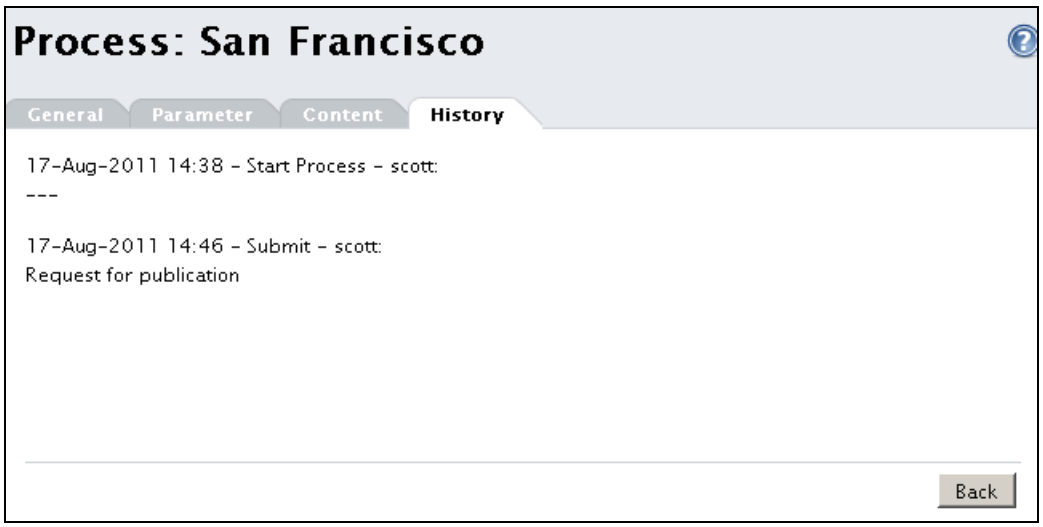


Figure 142: History of a Process

In the example in the figure above, two actions are listed:

- User `scott` started the process on 17 August, 2011 (without comments).
- Soon afterwards, `scott` submitted some changes with a "Request for Publication".

You can find an explanation of the actions (here: `start process` and `submit`) in the description of the process type (see Section 8.5).

8.5 Publication Process

The publication process is an approval process for the maintenance of portal contents (see Chapter 4 "Web Content Management"). Authors can create new contents or change existing contents without affecting the use of the portal. They work with a copy of the data.

The results of their work are viewed by an editor who makes the decision to approve or not. The editor can, if necessary, ask one or more reviewers for their opinion.

The publication process is a system-led process (see Section 8.1).

Note: This process is not available in every installation.

8.5.1 Overview

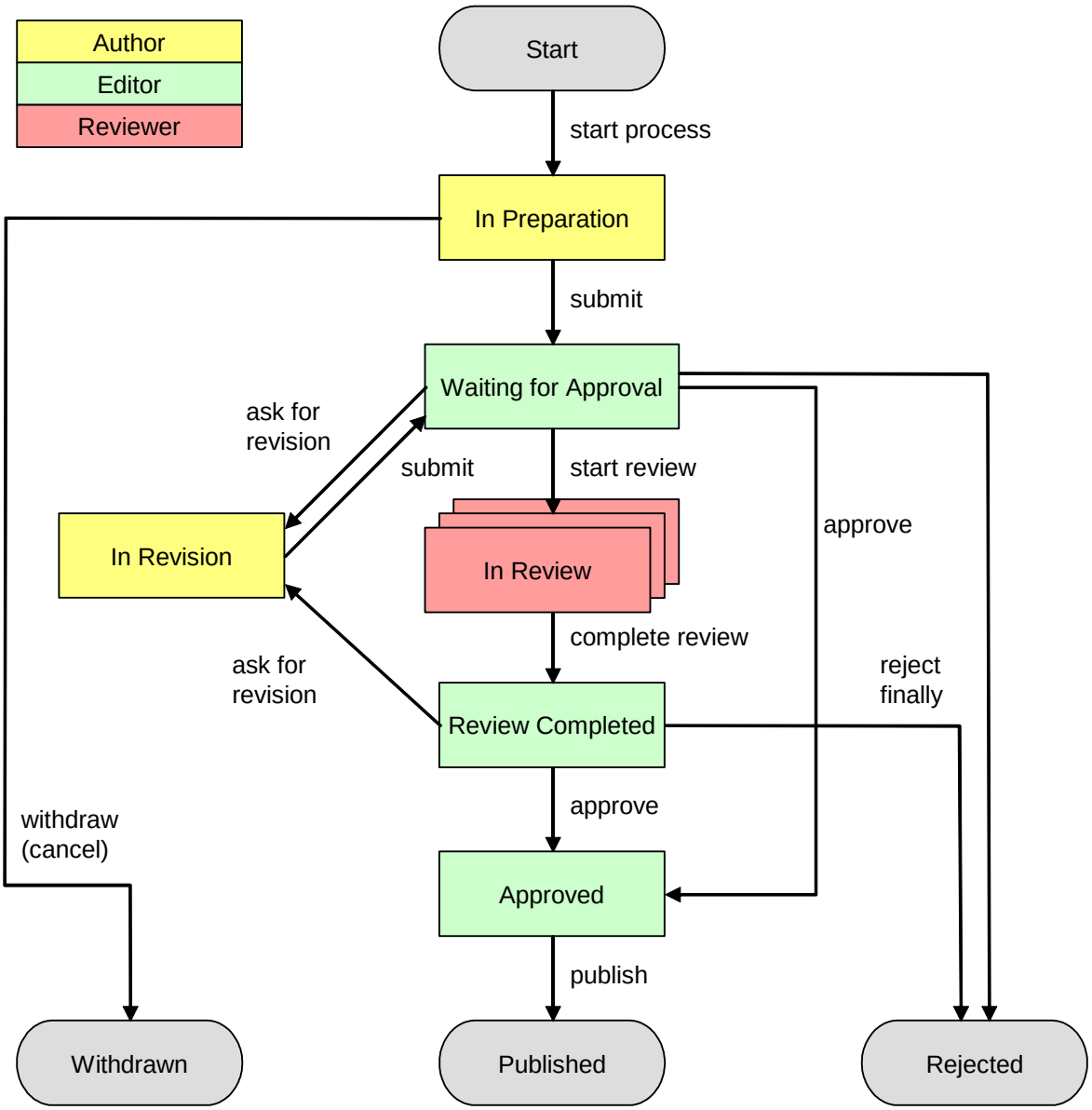


Figure 143: States and Steps of the Publication Process

The figure shows the states and steps in the publication process. This is a single-level approval process with an optional review.

All states are shown in color to indicate the responsibility (author, editor or reviewer). The person who is currently responsible processes or evaluates the contents in the work folder (see Section 8.2.3). There, all the functions of the file manager (see Section 3.2.5) are available.

The arrows indicate the possible next steps. These must be carried out manually by the responsible person on completion of work, for example, using the work list (column `Actions`, see Section 8.3.4).

For a detailed description of the states, see Table 31 below. The steps are described in Table 32.

8.5.2 Work Group

The publication process is tied to a work group (see Section 6.1.1). The work group is automatically retrieved from the folder where the processing starts (see Section 8.5.5).

Note: You must switch to expert mode (see Section 2.4.1.2) if you wish to have work groups displayed in the file manager or in the properties dialog (tab `Security`, see Section 3.3.5).

8.5.3 Roles

The participating users have different roles in the publication process.

- **Author**

  The author is the initiator of the process. The author starts the process explicitly or implicitly (see Section 8.5.5). Authors can create new contents or change existing contents.

  The editor can request the author to carry out a revision.

  All users who have access to the editorial view qualify as authors.

- **Editor**

  The editor views the submitted publication. The editor can reject it, demand a revision by the author, or request the opinion of selected reviewers.

  The author can select a specific editor. Otherwise, all editors in the work group can carry out the process (role `Editors`, see Section 6.1.2).

- **Reviewer**

  The reviewers evaluate the publication. They can also propose corrections to the content.

  All the reviewers in the work group (role `Reviewers`, see Section 6.1.2) qualify as reviewers.

8.5.4 States and Steps

The following tables describe the states and steps in the publication process.

State	Responsible	Description
In Preparation	Author	The author has started the process and begins to create, change or delete content (revision mode, see Section 8.5.6).

State	Responsible	Description
Waiting for Approval	Editor	The process awaits assessment by the editor. The editor can make changes, call for a revision, approve publication or ask one or more reviewers for their opinion.
In Review	Reviewer	The contents are available to the reviewers for assessment (copies). The reviewers can propose changes, give a rating and create a review report (`Review Result`).
Review Completed	Editor	All reviewers have provided their ratings and comments. The editor must now decide whether to publish the contents or request a revision by the author.
In Revision	Author	The process awaits revision by the author. The author can see the review reports and the working copies of the reviewers.
Approved	Editor	The editor has approved publication. At the scheduled time (publication date), the contents are activated automatically by the system.
Published	- none -	The contents are published in the target directory. The process is completed successfully. There is a copy of the old and new contents in the editorial working area. After a short period this is moved to the archive (see Section 3.1.1).
Rejected	- none -	Publication has been rejected by the editor. There is a copy of the rejected contents in the editorial working area.
Withdrawn	- none -	The author has terminated publication. A copy of the contents remains in the editorial working area.

Table 31: States in the Publication Process

The transitions between these states are triggered by one of the following actions.

Action	Target State	Description
Start Process	In Preparation	The author starts the process (see Section 8.5.5). The author remains responsible for the process and can edit the contents.
Submit	Waiting for Approval	The author has finished work and submits it to the editor. The author can explicitly select an editor. Otherwise, all editors in the work group can carry out the process.
Start review	In Review	The editor asks one or more reviewers for their opinion. A subprocess is started for each reviewer (see Section 8.5.7).
Complete review	Review Completed	The reviewer provides a rating to the editor. Optionally, the reviewer can pass on the review report (`Review Result`).
Ask for Revision	In Revision	The editor requests the author to revise the contents.
Approve	Approved	The editor approves publication. The editor also defines the time of publication and optionally an expiration date.
Publish	Published	The contents are automatically activated – at the time of publication – by the system. The process is completed.
Reject Finally	Rejected	The editor rejects publication due to fundamental flaws. The process is terminated.

Action	Target State	Description
Withdraw (cancel)	Withdrawn	The author withdraws the publication and thus ends the process.

Table 32: Steps (Actions) in the Publication Process

8.5.5 Starting a Process

You can start a publication process in two ways:

1. Using the list or symbols view of the file manager (see Section 3.2): Navigate to the folder in which you wish to create new contents or change existing contents. Then choose menu option `Edit > Apply for Update`.

   You can find an example in Section 8.7.2.

2. Using the layout preview of the file manager: In the required folder, switch to the layout preview (see Section 3.2.4.2). If you edit contents here, a publication process starts automatically – after confirmation is requested. However, this only occurs if your access privileges (see Chapter 7) are insufficient.

   This mode of operation is described in Section 8.7.1.

Once the process starts, you can edit the contents of the folder and all subfolders as long as they belong to the same work group as the process (see Section 8.5.2).

8.5.5.1 Problems?

Is the menu option deactivated or are the editing icons missing in the layout preview? Then the folder has probably not been set up properly:

- The folder must be assigned to a work group (instructions in Section 3.5.17).
- Editors must be defined in the work group (role `Editors`, see Section 6.4.2).

Note: The publication process is intended exclusively for portal pages in the context of Web Content Management (see Chapter 4). It cannot be used in other areas of the Folders or for special objects such as wikis or forums.

8.5.6 Copy and Original

In this process, you can only edit copies. Therefore, you work in a temporary work folder (reviewer) or in revision mode (author and editor).

For a general introduction to work folders, see Section 8.2.3.

8.5.6.1 Author and Editor

Authors and editors work directly in the portal area of the Folders (see Section 3.1.1). To edit existing contents, you must first reserve them (menu option `Edit > Reserve`). When you do this, a copy is created and appended to the original (revision mode, see Section 3.2.5.2).

The contents (in copy) can be edited normally following reservation. The complete layout preview functionality is also available with the usual editing functions (see Section 3.2.4.2). Using the link `Portal View` (at the top of the page), you can view a Web display that is visible only to you. Try it out.

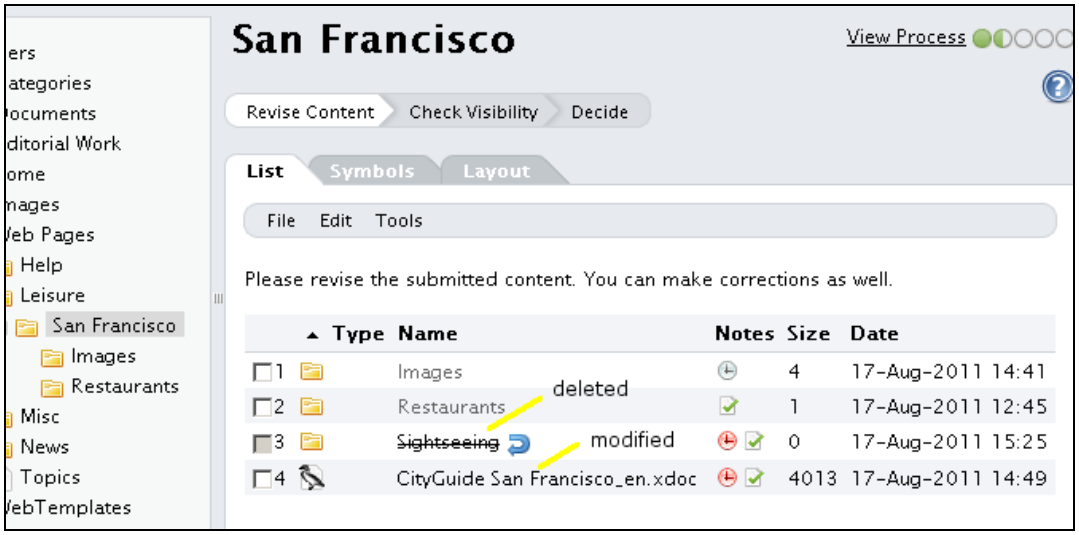


Figure 144: Change Indicators in the File Manager

Information on changes is displayed in the list view of the file manager (see above). This means that you can see at a glance which documents and folders have been edited or deleted. You can obtain more information as an info text if you position the mouse pointer over the name of an entry. This enables editors, for example, to gain a quick overview of all changes made by authors.

Using the menu option `Edit > Cancel Reservation`, you can undo changes individually.

Note: You can only reserve contents that belong to the same work group as the process.

Note: Contents that are currently being edited in other processes are locked.

8.5.6.2 Reviewer

The reviewers each receive a separate copy of the new and changed contents. Their working area is within the editorial folders (see Section 3.1.1).

8.5.7 Review Process

A separate subprocess with a temporary work folder is created for each reviewer. This appears in the work list as a review process. It has the same title as the main process (examples in Section 8.7.3).

The main process resumes only after all review processes have been completed.

8.5.8 Further Information

- Section 8.3: Work List
- Section 3.2: File Manager
- Section 8.7.1: Creating New Portal Pages
- Section 8.7.2: Revising a Portal Page
- Section 8.7.3: Involving Reviewers

8.6 Reminder Process

The reminder process is a simple, time-controlled process (see Section 8.1). The process sends a reminder e-mail to the initiator at a predefined time. Other persons are not involved.

Note: This process is not available in every installation.

8.6.1 Overview

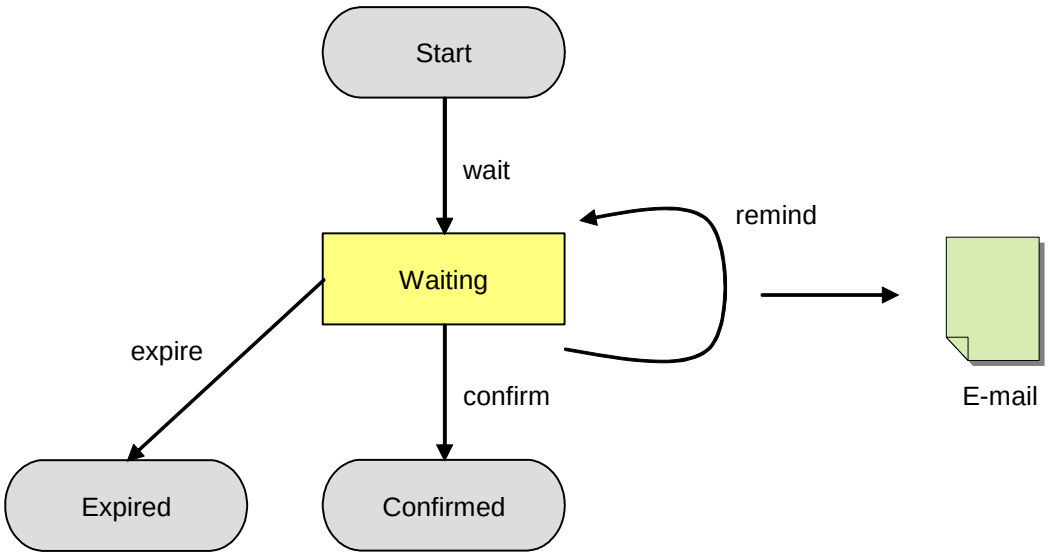


Figure 145: States and Steps in the Reminder Process

The figure shows the states and steps of the reminder process. After initialization, the process remains in the state `Waiting` until a reminder e-mail is sent automatically at the predefined time.

Now you can `Confirm` the process manually. Otherwise, up to three e-mails are sent at short intervals before the process ends automatically (`Expire`).

To confirm, open your work list (see Section 8.3) and carry out the action `Confirm`.

Note: The process does not require a work folder.

8.6.2 Starting

You start a reminder process in the editorial view using the menu option `Tools > Reminder Process`. You are requested to enter the time and message text for the reminder e-mail.

All other actions run automatically.

8.6.3 States and Steps in the Reminder Process

The states in detail:

- **Waiting:** The user has started a reminder process. The system is waiting for the reminder time. Up to three reminder e-mails are sent.
- **Confirmed:** The user has confirmed receipt of the reminder e-mail. The process is completed.
- **Expired:** After the third reminder e-mail, the process was ended automatically (`Expire`).

Possible actions:

- **Wait:** The user starts a reminder process (see Section 8.6.2).
- **Remind:** The system sends the user an e-mail with the appropriate text. This is a time-controlled step.
- **Expire:** The process is terminated automatically by the system after the third reminder e-mail.
- **Confirm:** The user confirms the process in the work list. If this confirmation is not made, up to three reminder e-mails are sent.

8.7 Typical Tasks

The following instructions show practical examples for your daily work:

- Section 8.7.1: Creating New Portal Pages
- Section 8.7.2: Revising a Portal Page
- Section 8.7.3: Involving Reviewers
- Section 8.7.4: Entering a Reminder
- Section 8.7.5: Viewing Archived Processes

8.7.1 Creating New Portal Pages

In order to create a new portal page, you must write a Web article and store it in the appropriate folder in the portal area (see Chapter 4 "Web Content Management"). You may have to first upload images and other material from your PC.

You do not need a process to carry out these tasks as long as you have sufficient privileges in the portal area. Otherwise you require the approval of an editor in the publication process.

We will illustrate this here using a city portrait as an example:

1. Navigate to the required area in the portal (here: `Leisure`):

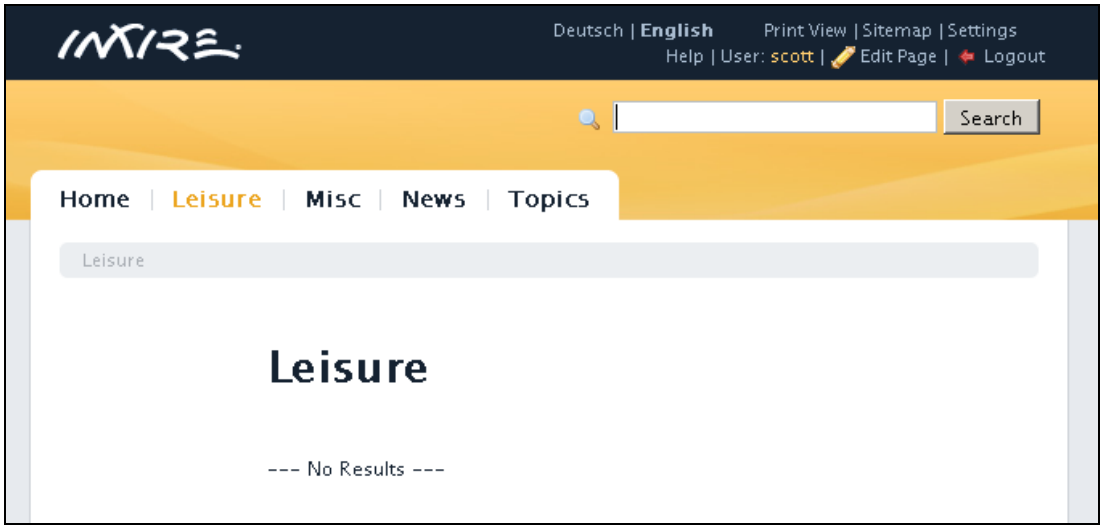

Deutsch | English
Print View | Sitemap | Settings
Help | User: scott | Edit Page | Logout
Search
Home | Leisure | Misc | News | Topics
Leisure
Leisure
--- No Results ---

Figure 146: Empty Portal Page in the Category "`Leisure`"

   In the figure the portal page is still empty. This is where the city portrait will appear.

2. Follow the link `Edit Page` (at the top of the page).

   Note: You must be logged in (here, user `scott`).

   The layout preview opens in the editorial view (see Section 3.2.3).

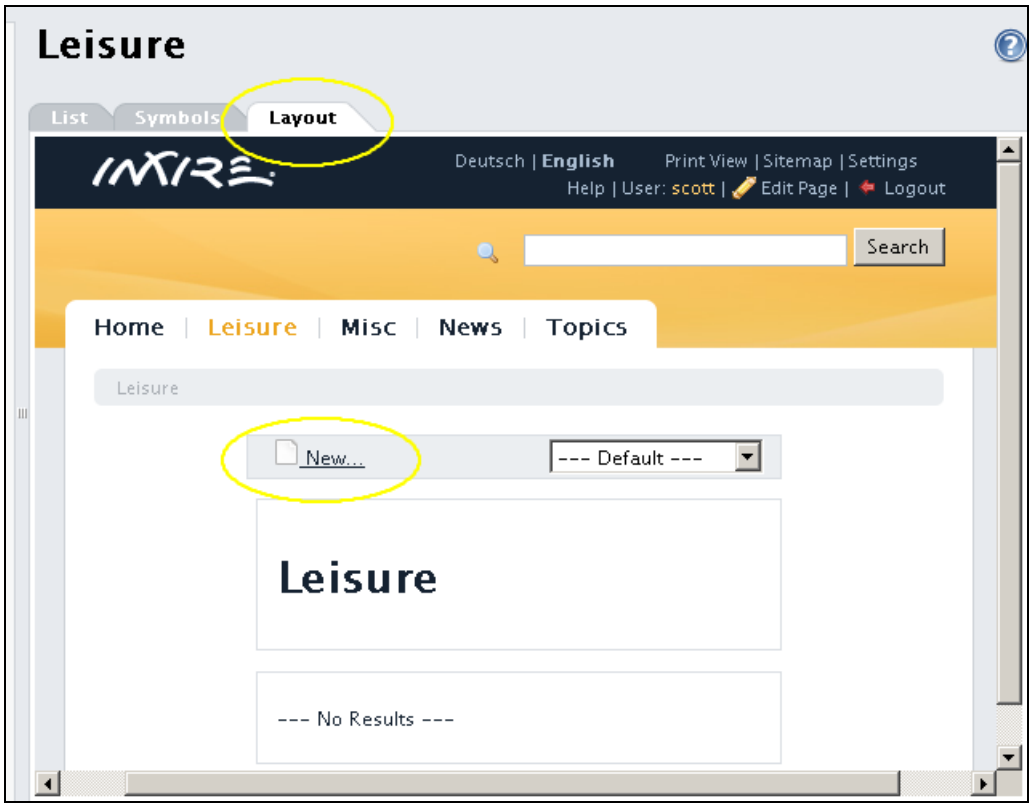


Figure 147: Layout Preview in the Editorial View

3. Click on `New...`.

   You are requested to start a process (only if you do not have write privileges):

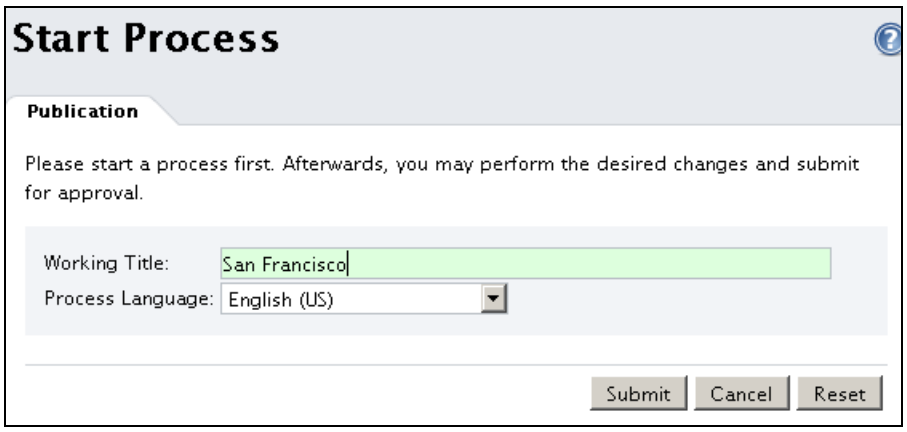


Figure 148: Starting a Process

4. Enter a working title and choose button `Submit`.

   A new publication process is created and then the New dialog is resumed:

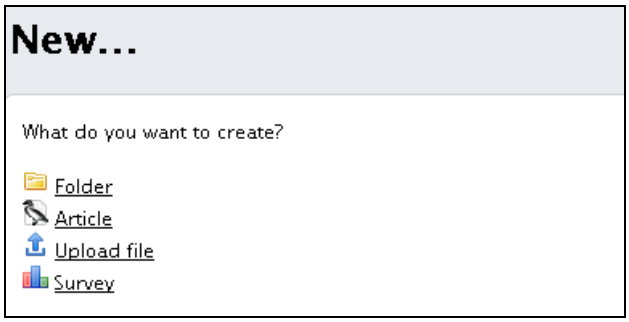


Figure 149: Selecting the Type of the New Entry

5. Create the required elements.

   You can choose to create a new folder (navigation node), create a Web article or first upload the required images (`Upload File`, see Section 3.5.2). Alternatively, you can also create an online survey (see Section 5.2).

   Note: Web articles are created and edited in the article editor. For a description, see Section 4.3; for detailed instructions, see Section 4.7.4.

   After this you return automatically to the layout preview and you can create further entries in the same way. In the following example, an image has been uploaded and used to create a Web article (No. 4):

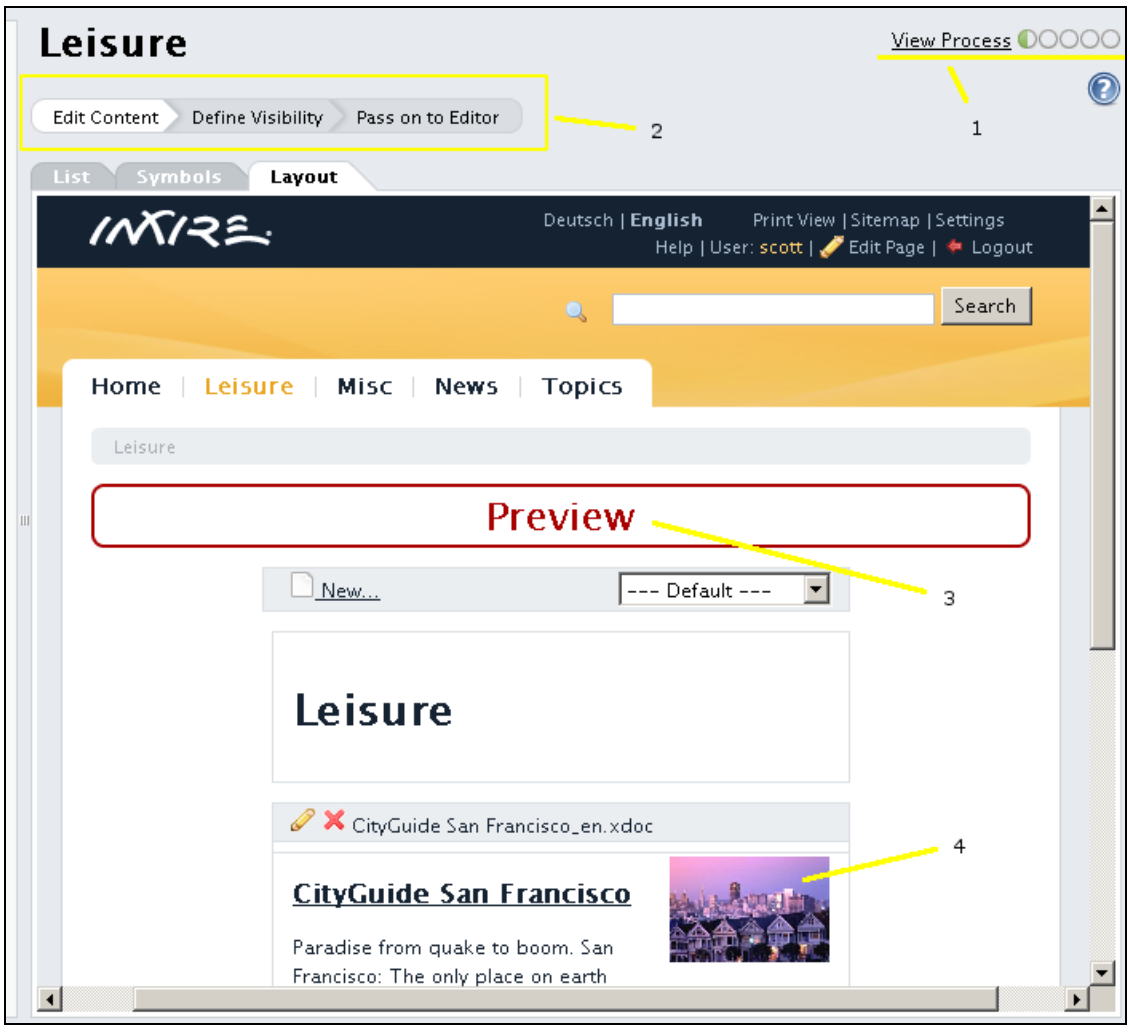


Figure 150: New Article in the Folder "`Leisure`"

Starting the process has changed the appearance of the screen (see Figure 147). At the top right (No. 1), there is now a link to the process details (see Section 8.4). Under the title (No. 2), a bar appears with your tasks (see Section 8.2.4). And on the embedded portal page, there is now an info text (No. 3) stating that this is no longer the original page that you are looking at but rather a private copy (see Section 8.5.6).

Note: Using the link `Portal View` at the top of the page (not in the figure), you can access a full-page preview. This is also only visible to you.

6. Navigate to the next task `Define Visibility`:

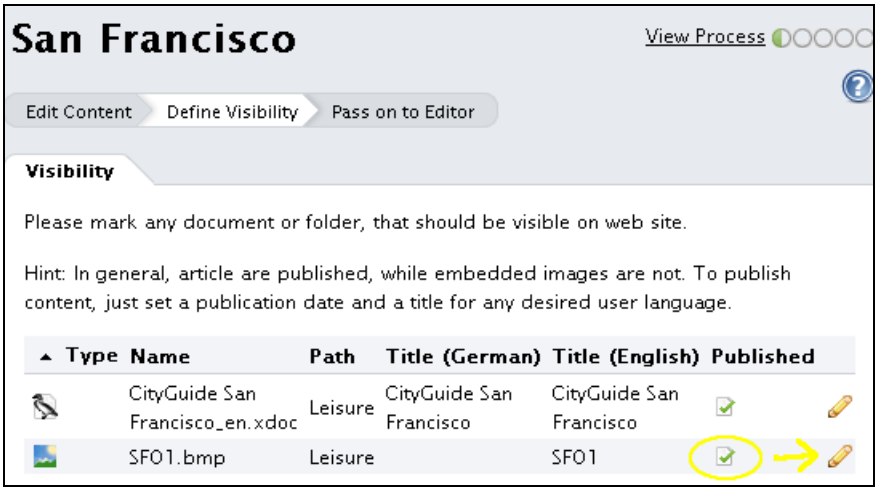


Figure 151: Defining Visibility

Check here which entries are to be visible in the portal (that is, published, see Section 4.1.4). The images of an article are not to be published (here: `SF01.bmp`). You can use the pencil to open the properties dialog and remove the check mark at `published` (see Section 3.5.16).

Note: All entries that you have created using the layout preview are automatically flagged as `published`.

7. The next task is `Pass On to Editor`.

   This opens a list of the possible process actions (see Section 8.5.1).

San Francisco
View Process
Edit Content
Define Visibility
Pass on to Editor
Actions
After you have finished your work, you may forward it to an editor for approval.
Submit
Pass on to editorial stuff for approval.
Withdraw (cancel)
Cancel publication process. Warning: Any content modified will be lost.

Figure 152: Possible Actions in the Publication Process

8. Choose the action `Submit`:

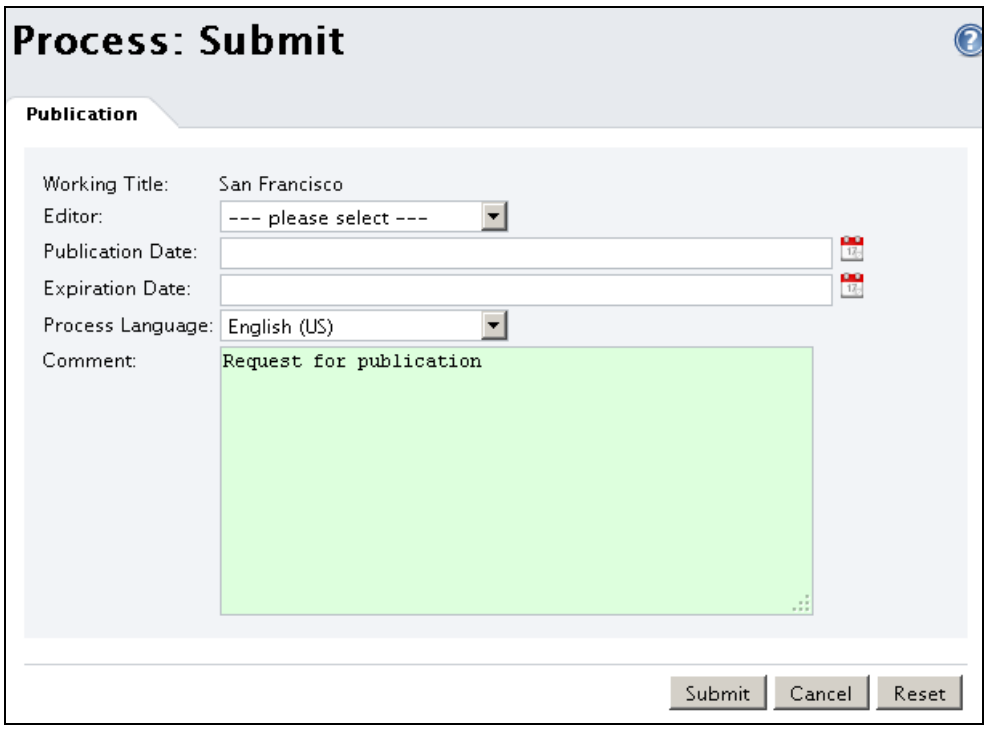


Figure 153: Submitting San Francisco City Portrait

9. Enter a `Comment` and submit the screen.

   Note: You can also select an editor and propose a publication and expiration date (see Section 4.1.4).

   A confirmation page is displayed. The button `Back` leads to your work list where you can follow the further progress:

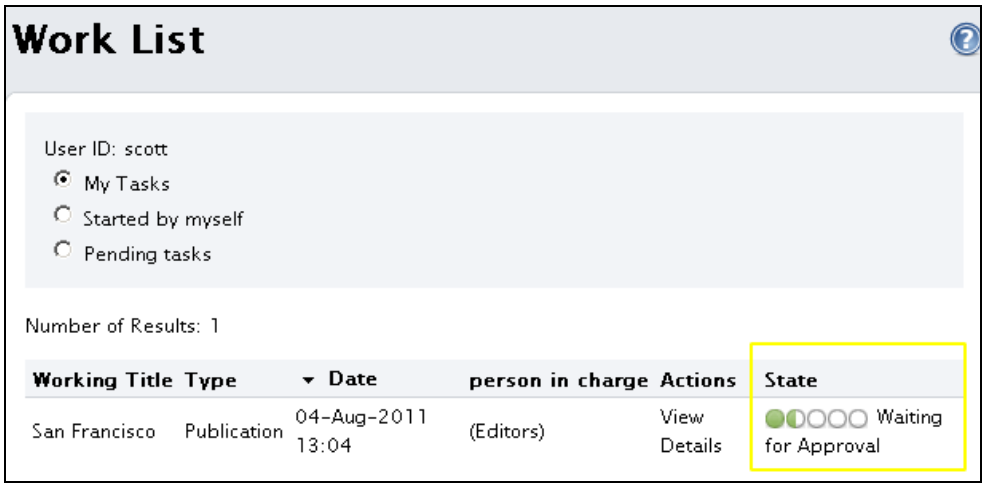


Figure 154: Author's Work List After Submission

Note: For a description of the work list, see Section 8.3.

Note: Since no specific editor was selected on submission, only the role `Editors` appears in the field `Person in Charge`.

10. All editors of the relevant work group (see Section 8.5.2) receive an e-mail notification and see the following entry in their work list:

Figure 155: Editor's Work List

Note: An editor must first reserve the process in order to carry out further actions.

11. An editor (here: `TestEditor01`) accepts the process using the action `Reserve Process`.

In the action menu, all actions of the process are now visible:

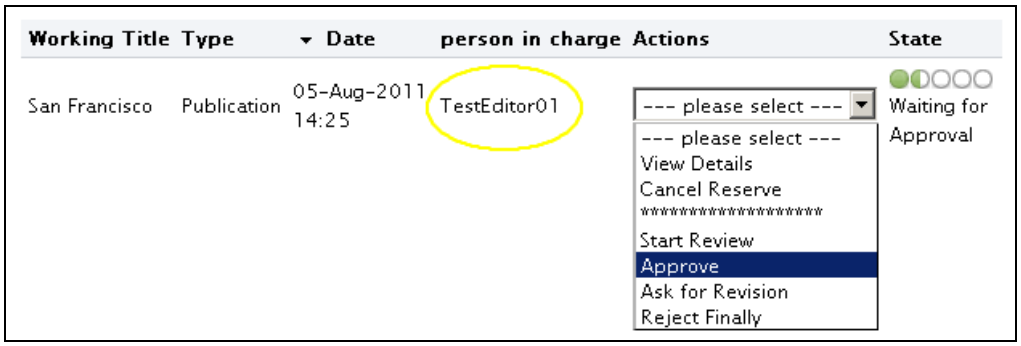


Figure 156: Editor's Work List After Reservation

Note: A click on the `Working Title` opens the work folder (see Figure 150). There the editor can view the contents of the process.

12. The editor chooses the action `Approve`:

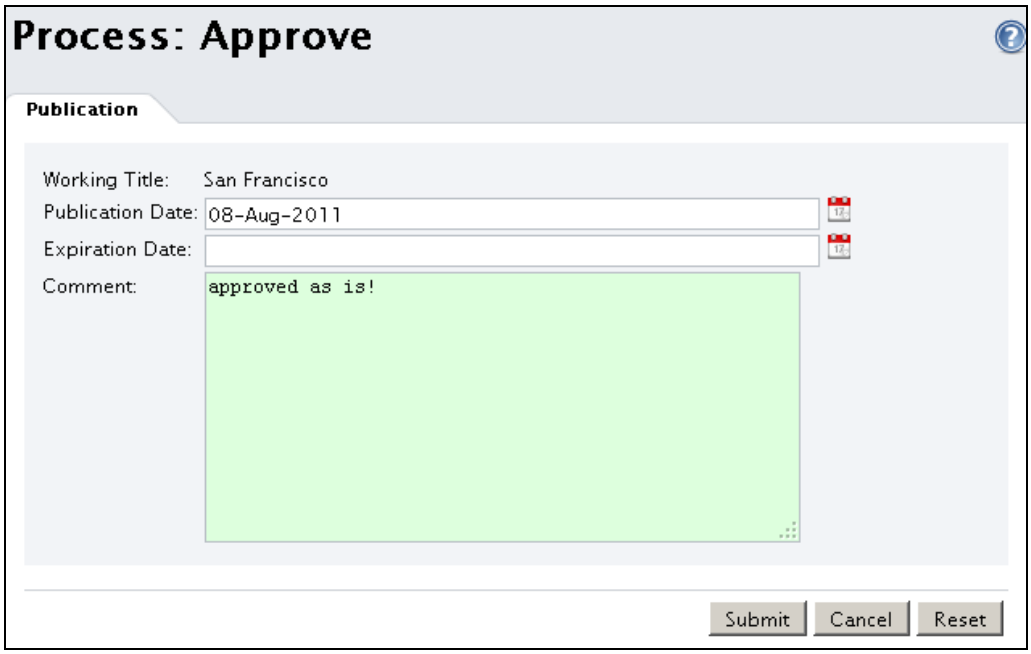


Figure 157: Approving a Process

Note: Alternatively, the editor can return the process to the author (`Ask for Revision`) or involve reviewers (`Start Review`, see Section 8.7.3).

13. Enter the publication date and comment and submit the screen.

    This completes the process.

    If the publication date is missing or is in the past, the contents are approved immediately. Otherwise, publication occurs at the specified time.

    Note: Time specifications are to the minute, for example, `08-Aug-2011 12:00`.

    Note: The optional expiration date limits the visibility in the portal (see Section 4.1.4.1). Caution: Per default, the contents are deleted automatically 30 days after the expiration date has passed.

Note: In this example, the contents were created in the layout preview. In the next section, you will see how experienced users work with the list or symbols view.

8.7.2 Revising a Portal Page

In Section 8.7.1, we demonstrated how you can create a new portal page using the layout preview of the file manager. There you can also revise existing contents by using the editing symbols (see symbols and in Figure 150).

The functions of the layout preview are, however, quite limited. Expert users, therefore, switch to the list or symbols view where a much greater range of functions is available, for example, copying and moving (see Section 3.5.7).

The following instructions should help to illustrate this:

1. Navigate to the required page in the portal (here: `Leisure`):

Deutsch | English
Print View | Sitemap | Settings
Help | User: scott | Edit Page | Logout
Search
Home | Leisure | Misc | News | Topics
Leisure
CityGuide San Francisco
Paradise from quake to boom. San Francisco: The only place on earth where even the fog is magical.

Figure 158: Portal Page with City Portrait

   The city portrait is to be extended and moved to a separate subfolder (navigation node).

2. Follow the link `Edit Page` (at the top of the page).

   Note: You must be logged in (here, user `scott`).

   The layout preview opens in the editorial view (see Figure 147).

3. Activate the `List` or `Symbols` tab and select all entries that you wish to revise. Then choose menu option `Edit > Apply for Update`:

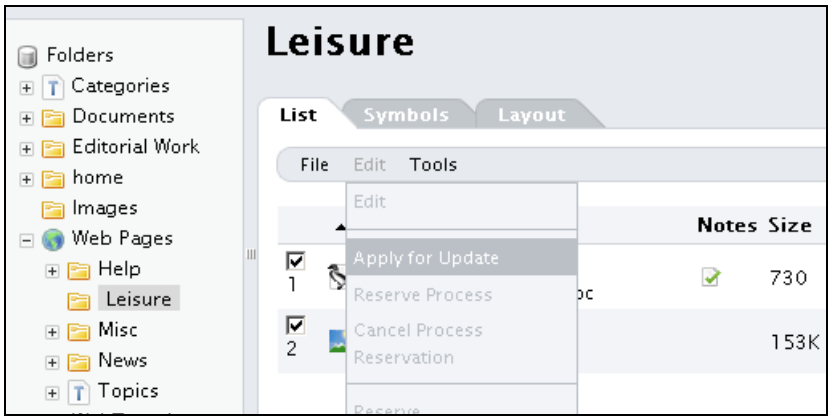


Figure 159: Starting a Publication Process

You are requested to enter a working title:

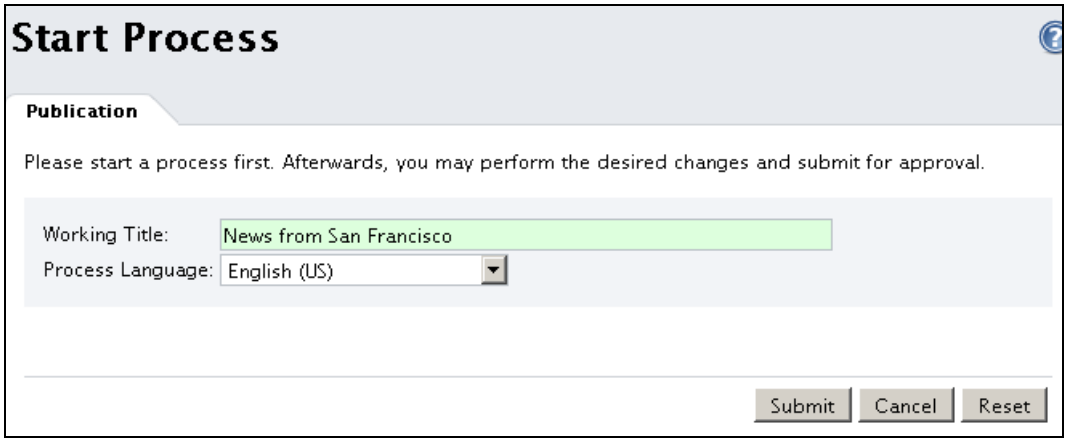


Figure 160: Entering a Working Title

4. Enter a working title and submit the screen.

   The file manager opens in revision mode:

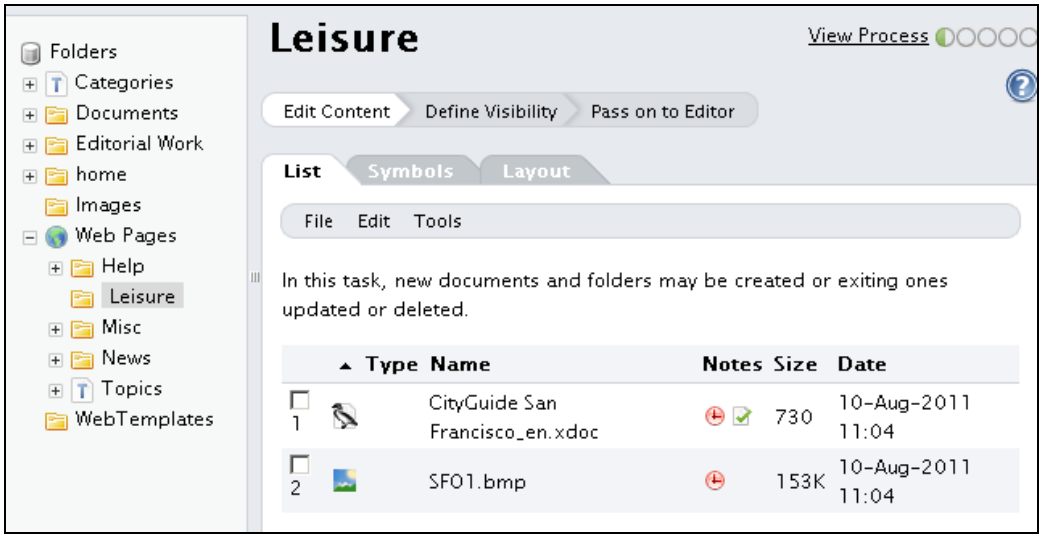


Figure 161: Work Folder Before Revision

5. Revise the contents.

   You can avail of all the editing functions in the menu bar (see Appendix 10.3). The special features of revision mode are described in Section 3.2.5.2. Typical work steps are demonstrated in Section 3.5.

   Lost? A complete overview of the numerous editing functions cannot be provided at this point. For an introduction to working with documents and folders, see Chapter 3. If you require information on editing portal contents, see Chapter 4.

   In the example, the contents were moved to the new subfolder `San Francisco`, a separate subfolder was created for images, and further articles were supplemented to the city portrait:

Figure 162: Work Folder After Revision

6. Define visibility (click on this task):

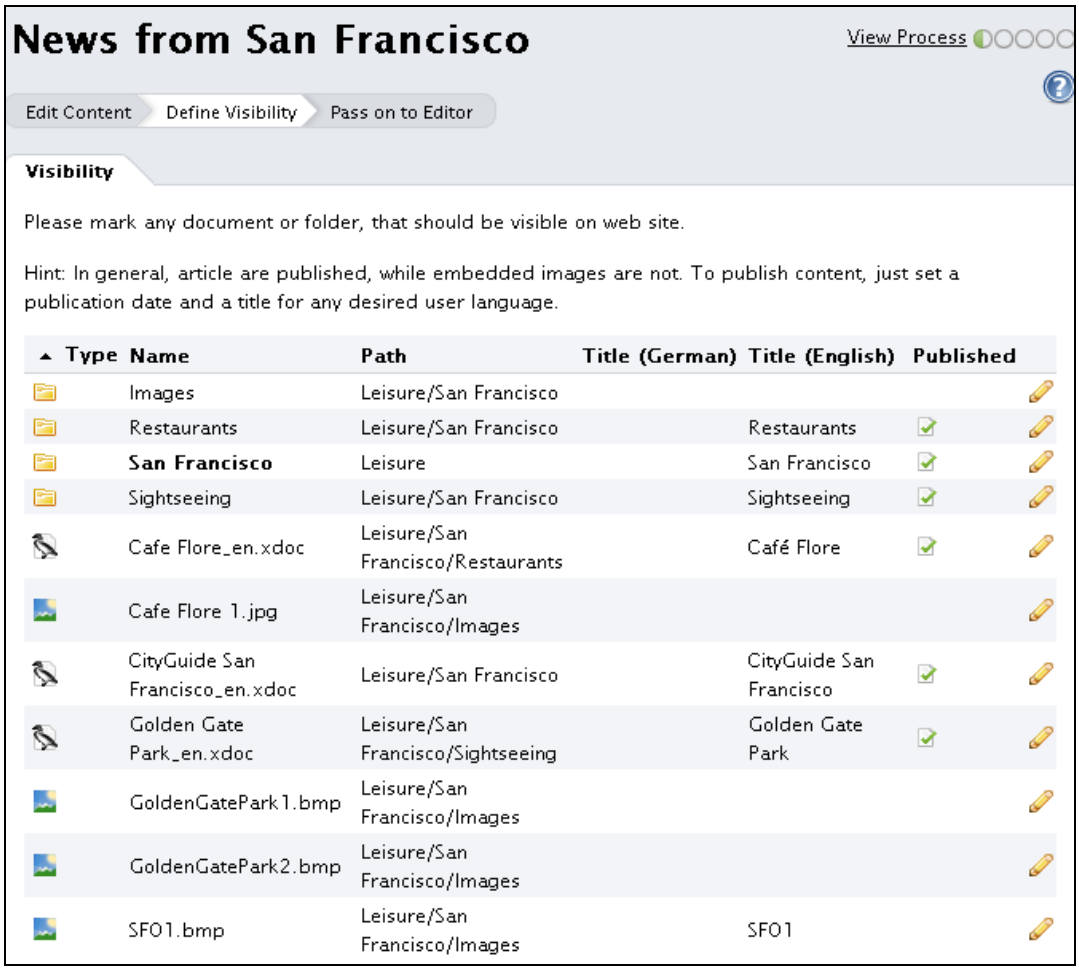

News from San Francisco
View Process
Edit Content
Define Visibility
Pass on to Editor
Visibility
Please mark any document or folder, that should be visible on web site.
Hint: In general, article are published, while embedded images are not. To publish content, just set a publication date and a title for any desired user language.
Type Name Path Title (German) Title (English) Published
Images Leisure/San Francisco
Restaurants Leisure/San Francisco Restaurants
San Francisco Leisure San Francisco
Sightseeing Leisure/San Francisco Sightseeing
Cafe Flore_en.xdoc Leisure/San Francisco/Restaurants Café Flore
Cafe Flore 1.jpg Leisure/San Francisco/Images
CityGuide San Francisco_en.xdoc Leisure/San Francisco CityGuide San Francisco
Golden Gate Park_en.xdoc Leisure/San Francisco/Sightseeing Golden Gate Park
GoldenGatePark1.bmp Leisure/San Francisco/Images
GoldenGatePark2.bmp Leisure/San Francisco/Images
SF01.bmp Leisure/San Francisco/Images SF01

Figure 163: Defining Visibility in the Portal

Note: Embedded images and hidden folders should not be published (see Section 4.1.4). To make changes, click on the pencil (already set correctly in the figure above).

7. Activate the task `Pass On to Editor` and there choose the action `Submit`:

   The submit dialog opens.

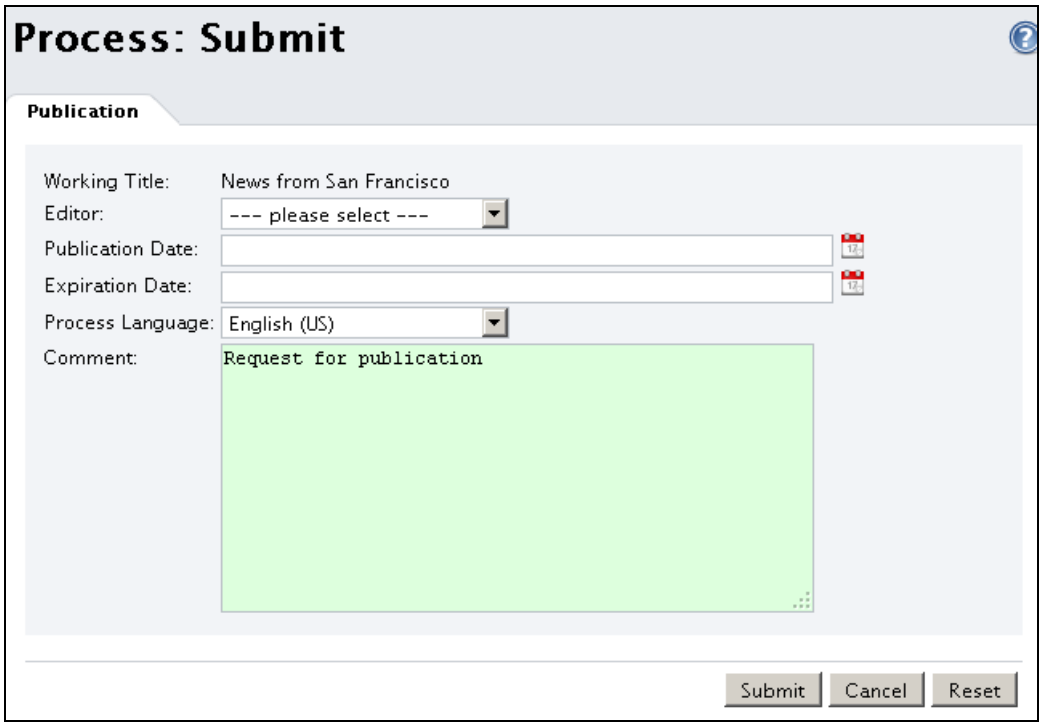


Figure 164: Submitting the New City Portrait for Approval

8. Enter a comment and submit the screen.

   Note: You can also select an editor or propose a publication and expiration date (see Section 4.1.4).

   A confirmation page is displayed. The button `Back` leads to your work list where you can follow the further progress (see Figure 154).

9. All editors of the relevant work group (see Section 8.5.2) receive an e-mail notification and see the process in their work list (see Figure 155).

10. An editor accepts the process using the action `Reserve Process` and then executes the action `Approve`.

    The contents automatically become visible in the portal on the publication date determined by the editor (see Section 8.7.1, points 10 to 12).

8.7.3 Involving Reviewers

As an editor in the publication process (see Section 8.5.1), you can request the opinion of one or more reviewers before you decide to publish.

The following instructions describe the basic procedure:

1. The author (here: `scott`) has started a publication process and has created or revised contents (see Section 8.7.1 and 8.7.2).

   Then the author submitted the process for approval.

2. As an editor (here: `TestEditor01`), you see the following entry in your work list:

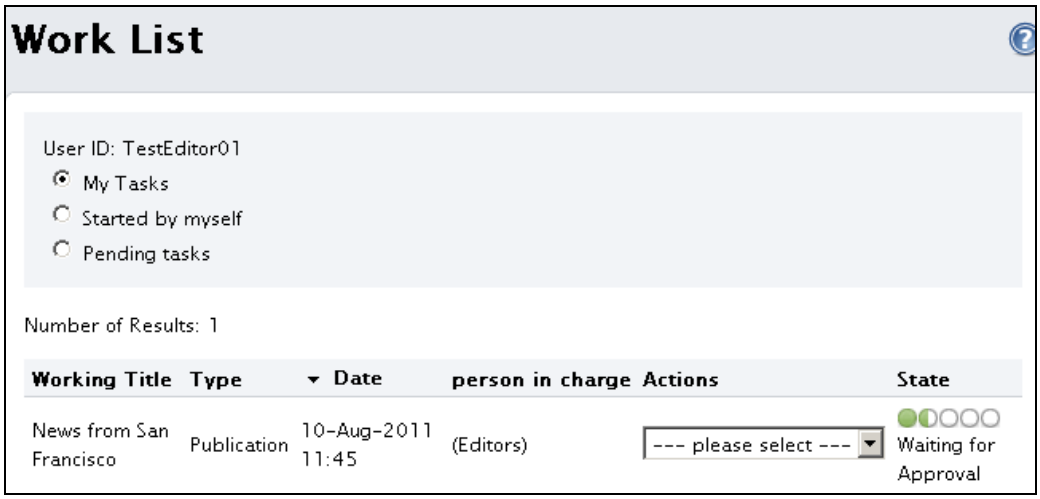


Figure 165: Publication Process Waiting for Approval

3. You may have to first reserve the process (action `Reserve Process`) if you have not yet been explicitly entered as the responsible person.

4. Then choose action `Start Review`:

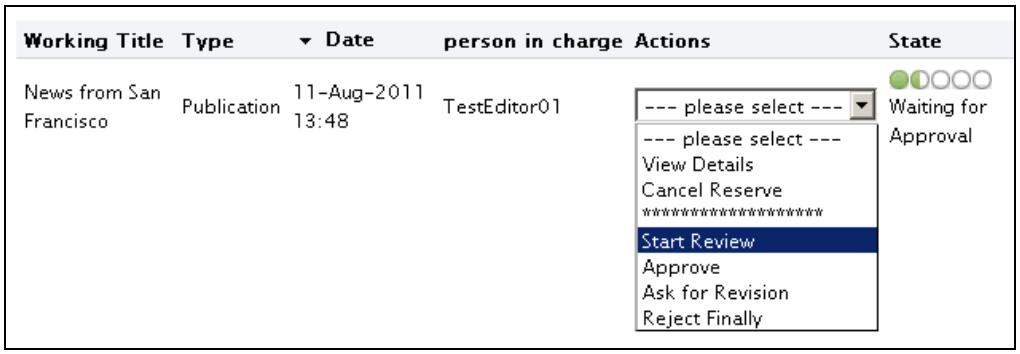


Figure 166: Starting a Review

The following dialog opens:

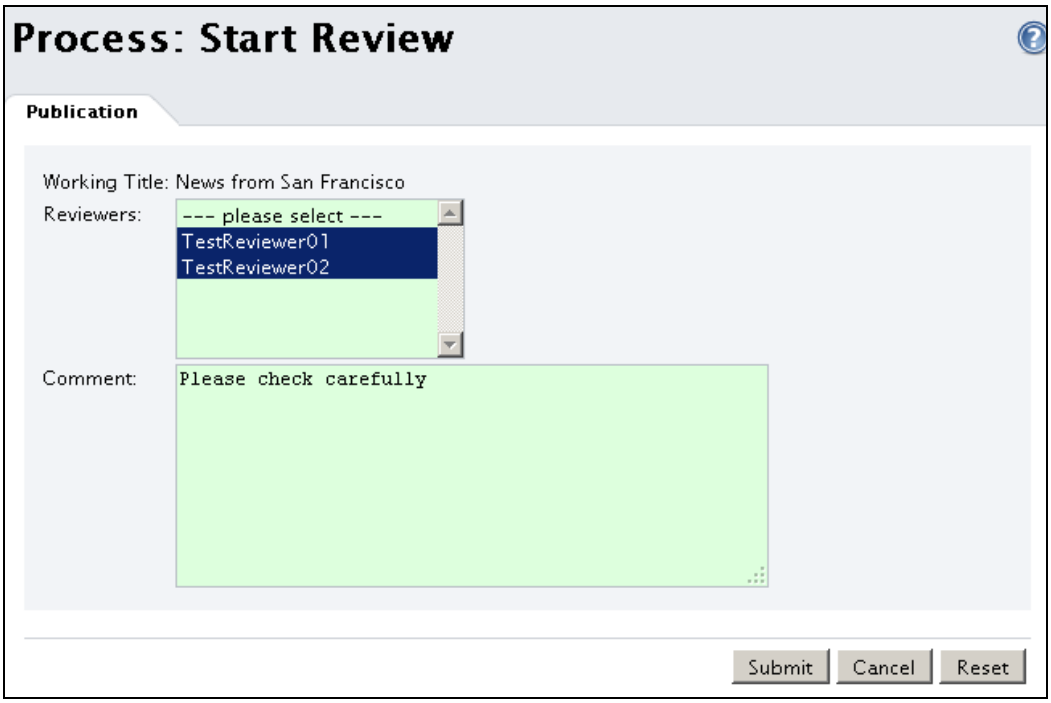


Figure 167: Forwarding to the Reviewers

Note: Depending on the configuration, you may not be able to select more than one reviewer.

5. Select the reviewers and choose button `Submit`.

   A subprocess is started for each reviewer, the main process is interrupted (see Section 8.5.7):

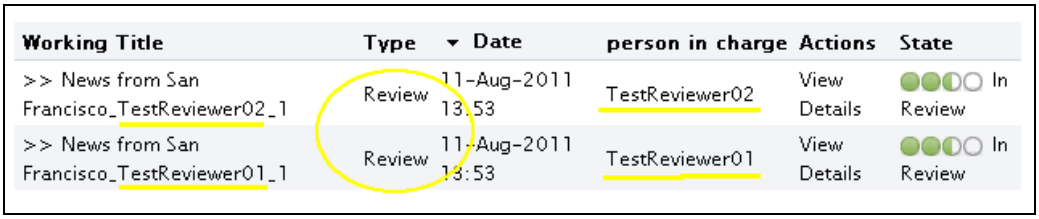


Figure 168: Review Processes Have Been Started

6. A reviewer (here: `TestReviewer01`) sees the following entry in the work list:

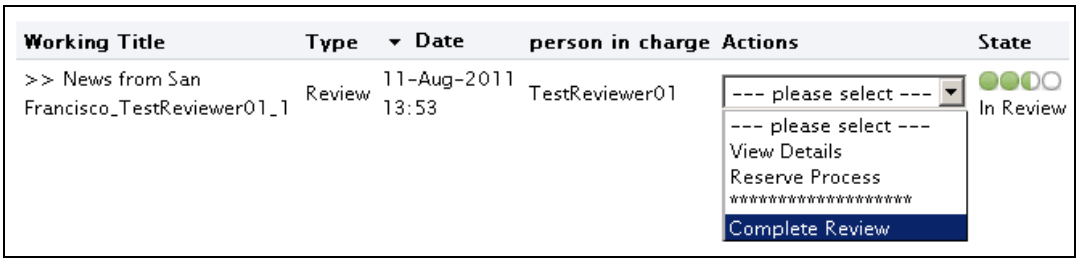


Figure 169: Reviewer's Work List

Note: The characters >> in front of the working title designate a subprocess.

Each reviewer receives a copy of the submitted contents in their work folder. A click on the working title takes you there. The reviewers can store a review report as a Web article, for example, in this folder.

Note: The reviewer can also make changes directly in the contents (local copy). In the event of a subsequent revision, these changes are then available to the author.

7. The reviewer chooses the action `Complete Review`:

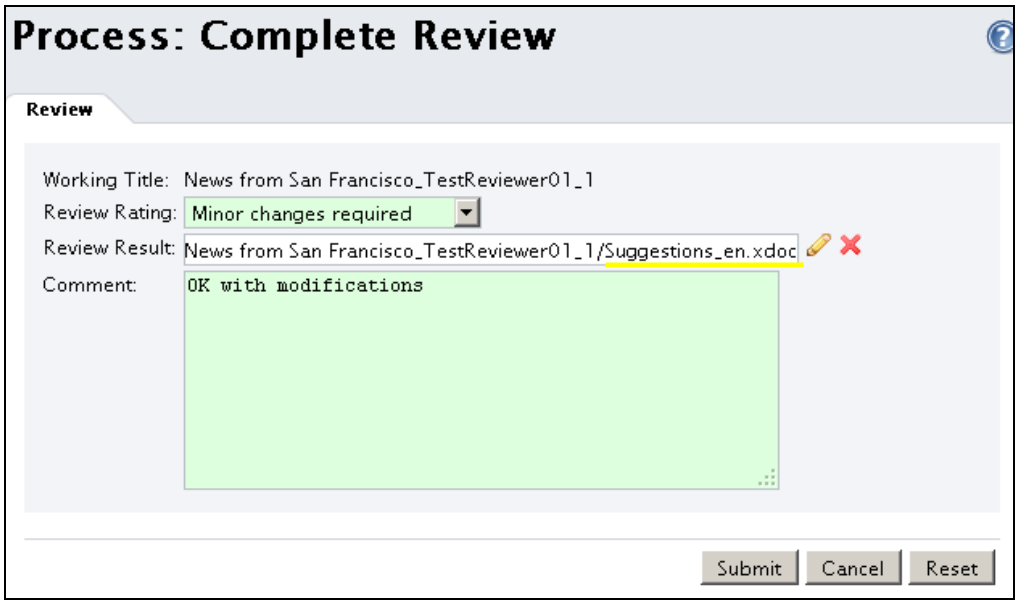


Figure 170: Approving a Document

It is mandatory to provide a `Review Rating` (either "No changes required", "Minor changes required", "Extensive changes required" or "Reject publication").

In addition, the review report can be specified in the field `Review Result` if this has been created (by clicking on the pencil, you open a selection dialog).

8. The reviewer enters a rating and submits the dialog.

This completes the review process.

When all reviews have been completed, the main process is resumed and appears again in the editor's work list (`TestEditor01`):

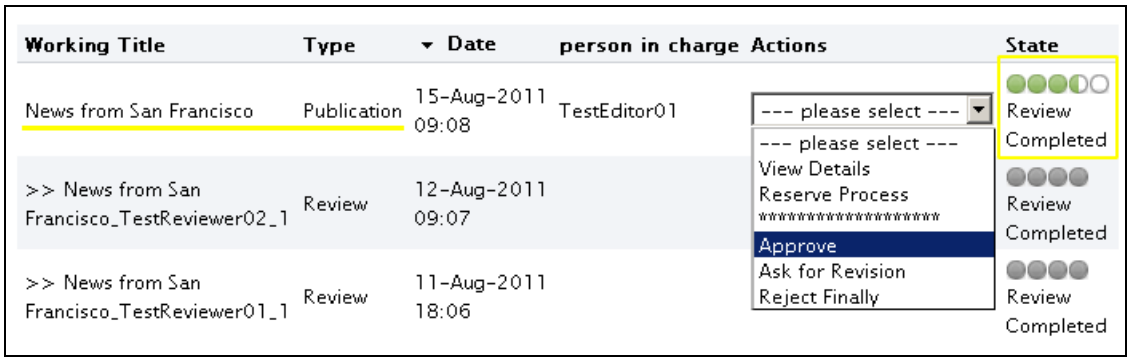


Figure 171: Editor's Work List After Completion of Reviews

9. As the editor, you can now `Approve` the process, return it to the author for revision (`Ask for Revision`) or `Reject Finally`.

   The possible steps in the publication process are illustrated in Figure 143 (see Section 8.5.1).

Note: If the author submits the contents again after the revision, as an editor, you can start another review cycle.

Note: The quickest way to view the review reports is using the process details. Open the work list and click on the column `State`. The process details open (see Section 8.4). On the `Parameter` tab page you can find links to the reports. The field `Review Rating` displays the lowest rating of all reviewers (see Figure 170).

8.7.4 Entering a Reminder

With inxire ECM, you have a convenient reminder process at your disposal. This sends a reminder e-mail to the initiator at a predefined time (see Section 8.6).

An example:

1. Open the Folders (see Section 3.1).
2. Activate the `List` or `Symbols` tab on the right and choose menu option `Tools > Reminder Process`:

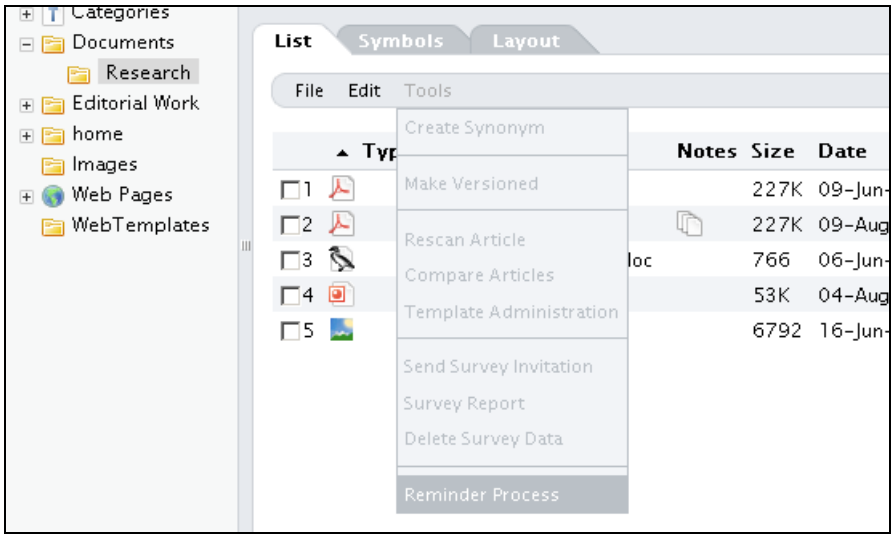


Figure 172: Starting a Reminder Process

The following dialog opens:

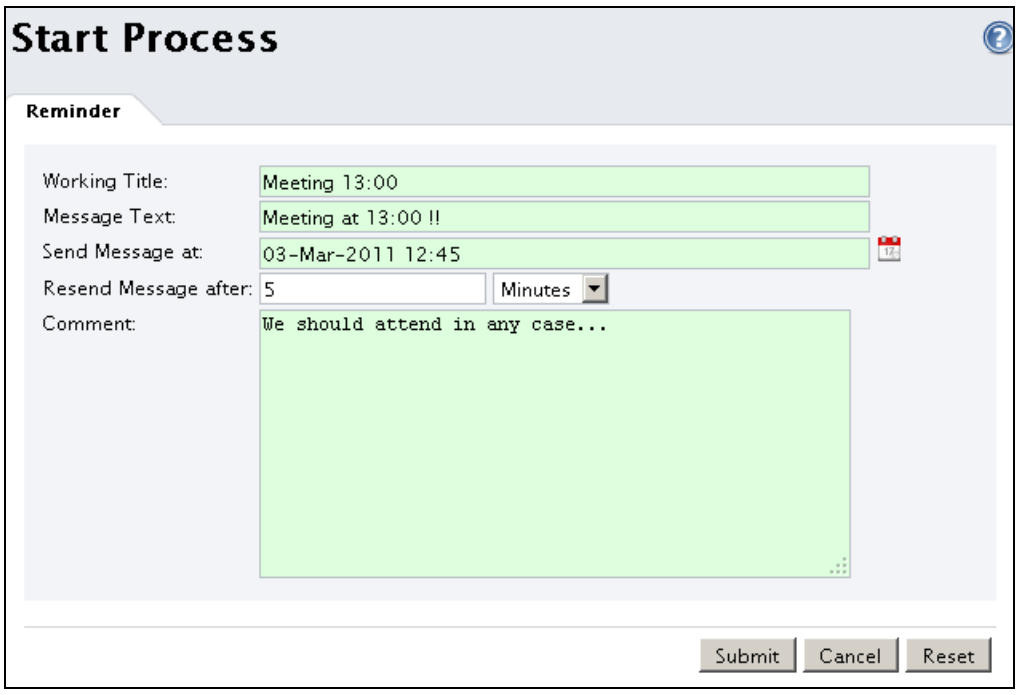


Figure 173: Defining the Reminder Time and Text

3. Enter the message text, reminder time, time interval between the reminders if required, and `Submit` the dialog.

   Note: The comment is intended for the process history (see Section 8.4.5).

   In the work list (called using the main navigation), the following entry appears (user `scott`):

Figure 174: Reminder Process Waiting

4. At the specified time the system sends a reminder e-mail:

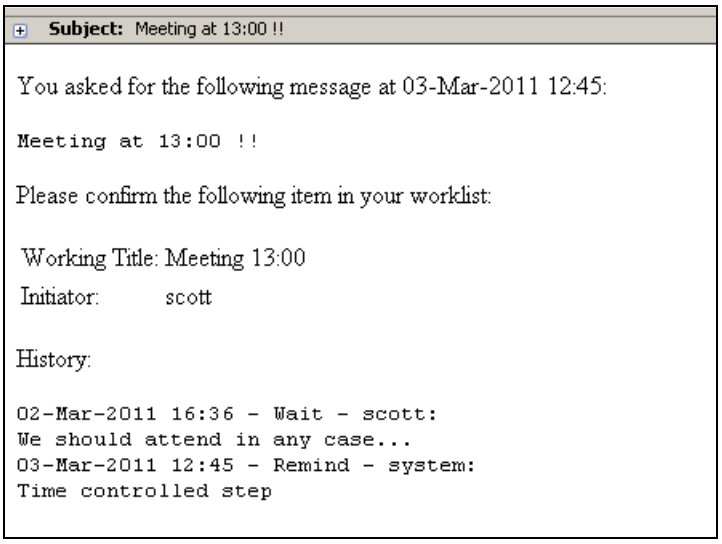

Subject: Meeting at 13:00 !!
You asked for the following message at 03-Mar-2011 12:45:
Meeting at 13:00 !!
Please confirm the following item in your worklist:
Working Title: Meeting 13:00
Initiator: scott
History:
02-Mar-2011 16:36 - Wait - scott:
We should attend in any case...
03-Mar-2011 12:45 - Remind - system:
Time controlled step

Figure 175: Reminder E-Mail

Note: At the specified interval (here: 5 minutes), up to three e-mails are sent before the process expires automatically.

5. To prevent the system sending further e-mails, execute the action `Confirm` in the work list. Enter a comment in the subsequent dialog and submit the screen.

   The process is completed.

Note: The reminder e-mails are sent with a short time delay in some cases because the system queries pending actions at predefined intervals, per default, every five minutes. If necessary, the system administrator can configure shorter intervals.

8.7.5 Viewing Archived Processes

Once a process has been completed, it remains in the work list for a certain period – per default 30 days – before it is moved to the archive.

You can also display archived processes in the work list if you switch to expert mode (see Section 2.4.1.2).

The steps in detail:

1. Open the editorial view (see Section 2.4).
2. Click on `Expert` (at the top of the page).
3. Navigate to the `Work List` using the main navigation.

   The work list opens with extended search options.

   Note: Per default, only running and finished processes are displayed, not those that are archived.
4. At the `State` search field, flag the option `Archived` and choose button `Submit Search`.

   The work list is generated again and now also contains the archived processes:

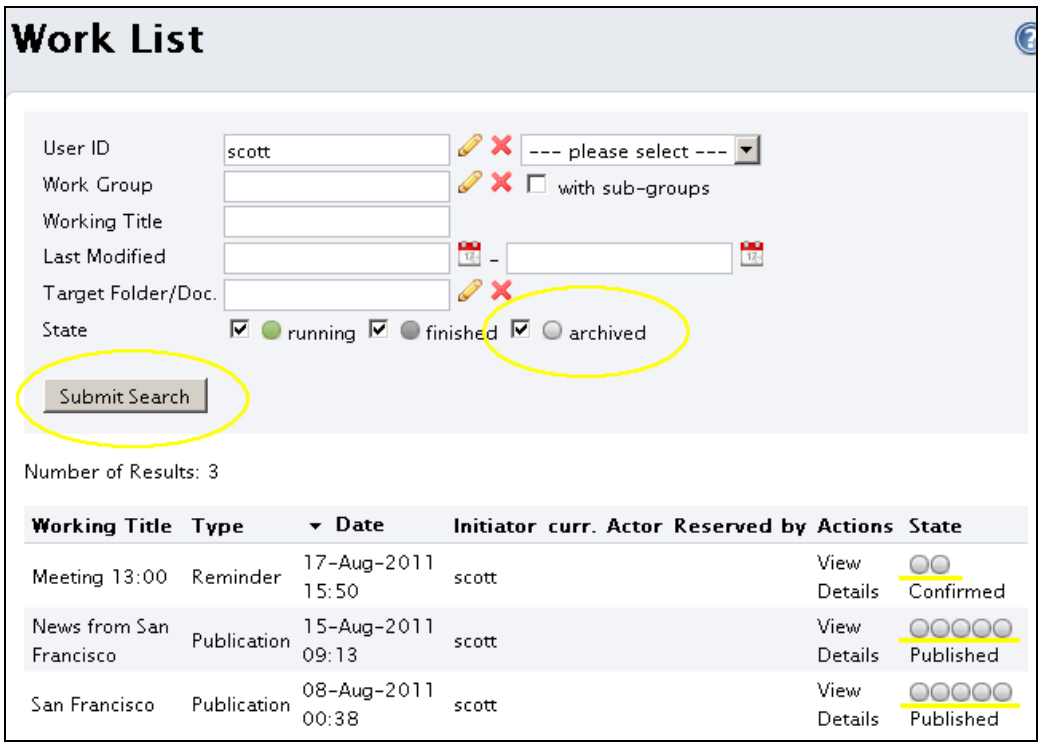


Figure 176: Work List with Archived Processes

Note: You can recognize archived processes by the light gray graphic in the `State` column.

Note: For a description of all the search options, see Section 8.3.2.

9 Search

9.1 Search in inxire ECM

In large portals containing huge amounts of information, an efficient search is of critical importance. For this reason, inxire ECM provides entry fields for detailed searches in various areas such as forums, wikis and topic trees (see Chapter 5). In addition, the global search (see Section 9.3) is always available in the page frame.

The use of these search fields is intuitive and self-explanatory. However, a more in-depth understanding can help you to achieve the desired results quicker and more effectively. The following sections describe the different ways of using the search and also provide useful tips and notes.

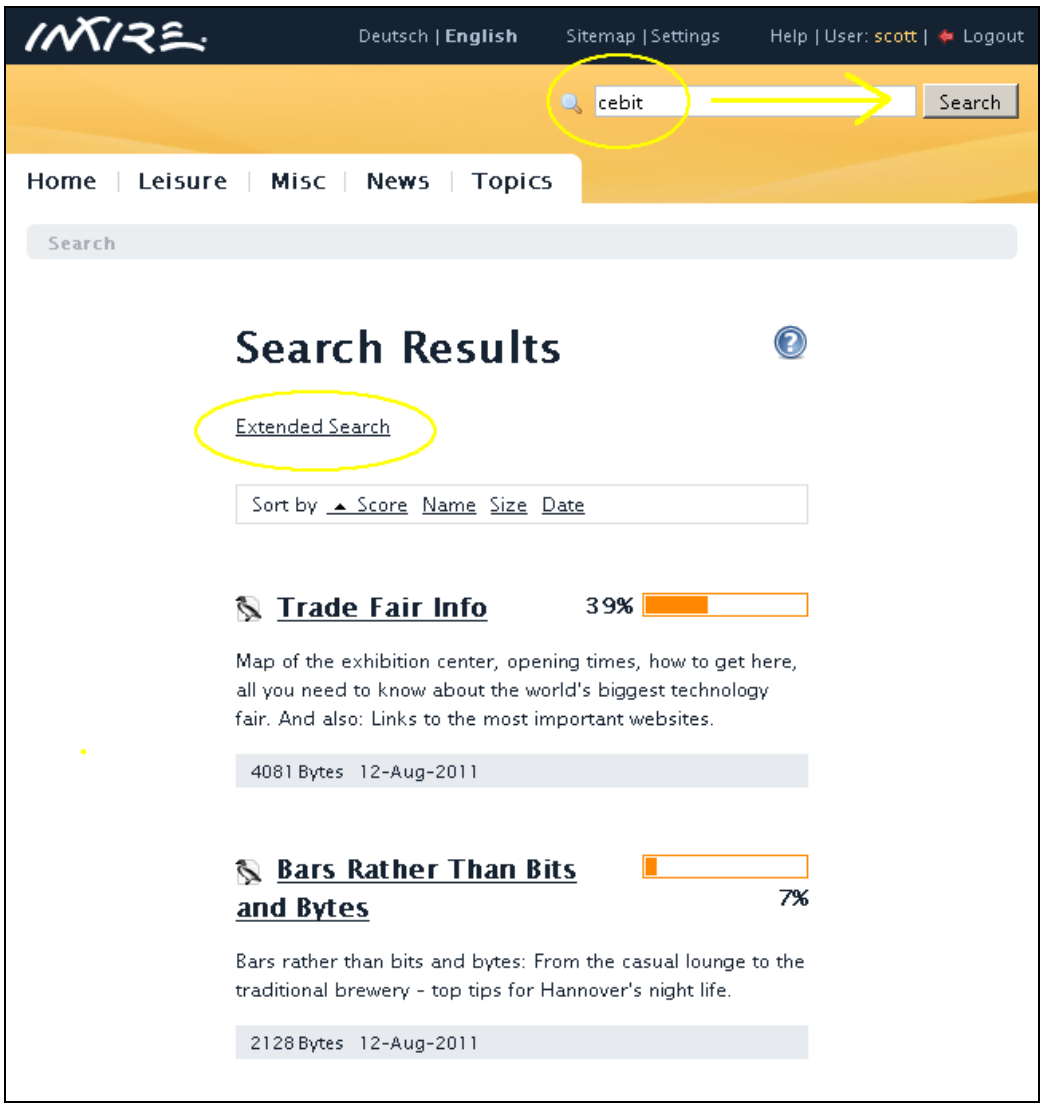

Deutsch | English
Sitemap | Settings
Help | User: scott | Logout
cebit
Search
Home | Leisure | Misc | News | Topics
Search
Search Results
Extended Search
Sort by Score Name Size Date
Trade Fair Info
39%
Map of the exhibition center, opening times, how to get here, all you need to know about the world's biggest technology fair. And also: Links to the most important websites.
4081 Bytes 12-Aug-2011
Bars Rather Than Bits and Bytes
7%
Bars rather than bits and bytes: From the casual lounge to the traditional brewery - top tips for Hannover's night life.
2128 Bytes 12-Aug-2011

Figure 177: Global Search in the Portal (Appearance May Differ)

9.1.1 Full-Text Search

The most comprehensive search is the full-text search across all text content. Examples of a full-text search include the global search in the page frame (see Section 9.3) and the search in the forum (see Section 5.1.1.4).

9.1.1.1 Tips and Tricks

- Per default, the search looks for entire words. If you do not know the exact word ending, append `*` as a wildcard.

  Example: `house*`

  (Finds all words that begin with "house" including "house" itself.)

- You can enter multiple consecutive words separated by blank spaces. Note: In the fields of the extended search (see below) you must enclose the entire phrase in parentheses.

  Example: `behind the house`

  (Finds all texts that contain these words in the sequence specified.)

- You can use `*` and `?` as wildcards. The asterisk represents any number of characters or none at all. The question mark replaces exactly one letter.

- To enter blank spaces and special characters, use double quotation marks.

  Example: `"Hans-Martin"`

  (Finds all content with exactly this phrase. Without the double quotation marks, the hyphen would be ignored and the system would search for the words "Hans" and "Martin".

- Advanced users can use a query language (see Section 9.2).

  Example: `(today or tomorrow) and Monday`

  (Finds all texts that contain the word "Monday" and one of the words "today" or "tomorrow".)

- The search is not case-sensitive.

9.1.1.2 Extended Full-Text Search

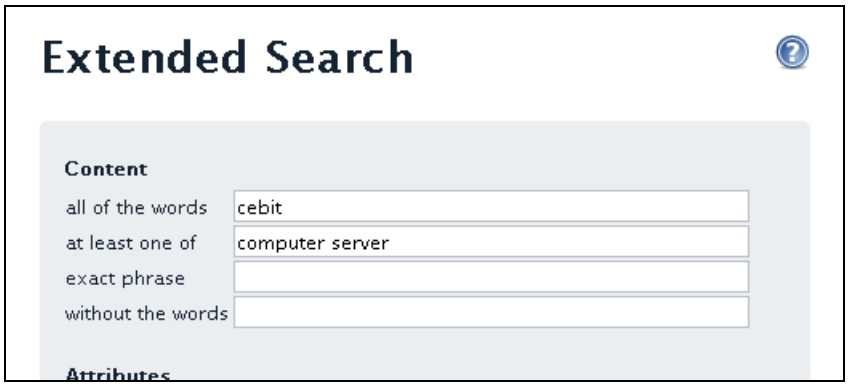


Figure 178: Extended Search in the Content (Portal)

The link `Extended Search`, which is found on every results page (see Figure 177), opens the extended search options. Four entry fields are provided for the search in the content:

- `all of the words`

  Each search term entered must occur in the text but not necessarily in the sequence specified.

- `at least one of`

  The text must contain at least one of the search terms.

- `exact phrase`

  The search term entered must occur in the text exactly as it is written. Caution: Special characters are interpreted exactly as written!

- `without the words`

  The text cannot contain any of the specified words. This function can only be used in conjunction with an entry in the previous search fields.

Note: Experienced users can use a query language expression in place of a search term (see Section 9.2, except in the field `exact phrase`). Enclose the entire expression in parentheses, for example, `((today or tomorrow) and Monday)`.

9.1.2 Word Search

The word search is a simplified form of the full-text search. It searches for entire words, with wildcards if applicable. Parentheses, quotation marks or other elements of the query language are not permitted.

The word search is used, for example, in the specific search for page titles (see extended search, Section 9.3.2.2).

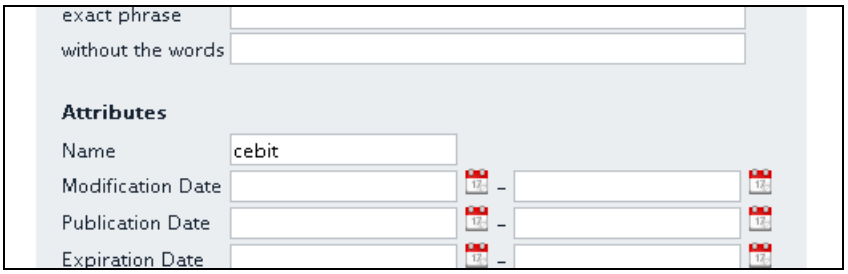


Figure 179: Extended Search in the Page Title (Portal)

9.1.2.1 Tips and Tricks

- The search looks for whole words. If the word ending is not known, use a wildcard, for example, `house*`.
- Multiple words are interpreted as a phrase and are found only in the specified sequence.
- You can use `*` and `?` as wildcards. The asterisk represents any number of characters or none at all. The question mark replaces exactly one letter.
- The search looks for all other special characters exactly as specified.
- Enter a single asterisk `*` to display all results (exercise caution here).
- As a rule, the search is not case-sensitive.

9.1.3 Search for Text Attributes

In the search for simple text attributes, such as user names, the system does not search for words. Instead, the search term must match the start of the text. You can use wildcards.

You can find examples of this type of search in the topic tree (see Section 5.7.1.4) or in various selection dialogs (see Section 9.5).

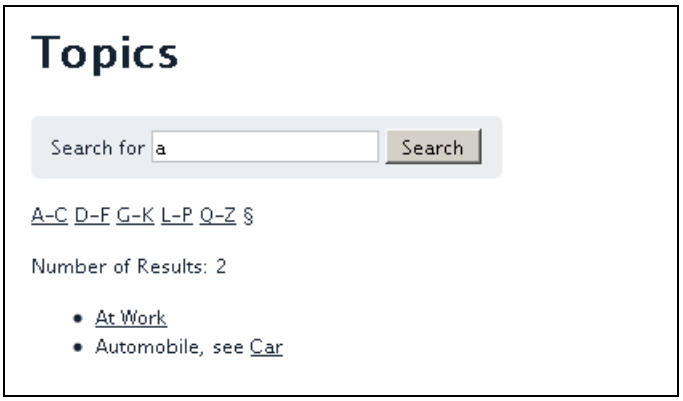


Figure 180: Search in a Topic Tree

9.1.3.1 Tips and Tricks

- You can use `*` and `?` as wildcards. The asterisk represents any number of characters or none at all. The question mark replaces exactly one letter.
- Enter a single asterisk `*` to display all results (exercise caution here).
- An `*` is added automatically after the search term, this means that it searches for the start of the text.

  Example: "Ho" finds "house", "hotel" etc., but not "my house".
- As a rule, the search is not case-sensitive.

9.1.4 Multilingual

If your portal supports multiple languages, you will probably have noticed that when you change the language (utilities at the top of the page), sometimes different articles and modified navigation nodes are displayed (see Section 4.1.4.2).

The search in the portal also adapts to the language that is set. In some cases, therefore, you may have to change the language to find articles in a different language.

Bear in mind when searching that an article or navigation node, even if visible in all languages, can have a different designation in each language. If we assume, for example, that the area `News` in English corresponds to `Aktuelles` in German, then you will only find it under this name if you have set the language to German (search by page title, see Section 9.3.2.2).

Note: This only applies to the search in the portal. In the editorial view (see Section 2.4) all hits are always shown – independent of your language setting. Designations are determined by the language-independent name, not the title (see Section 3.3.3).

9.1.5 Further Information

More information is available on the following topics:

- Section 9.2: Query Language of the Full-Text Search
- Section 9.3: Global Search in the Portal
- Section 5.1.1.4: Search in a Forum
- Section 5.3.1.5: Search in a Wiki
- Section 9.4: Search in the Editorial View

9.2 Search for Advanced Users

Behind the entry fields of the full-text search lies a powerful query language. You can use this to describe logical dependencies between the search terms more precisely than is possible using the four fields of the extended search (see Section 9.1.1.2). Or perhaps you don't know exactly which word occurs in the text? Using the query language, you can extend the search to include similar or related terms.

The query language helps you to find the correct document among a large volume of similar texts. It is easy to learn and you can use it in both the global search (see Section 9.3) and the search in a forum (see Section 5.1.1.4).

9.2.1 Introduction

The basic idea is to combine search terms with **operators** in order to obtain more exact results:

- `Tree` **and** `garden`
- `Apple` **or** `pear`

Or to extend their meaning using **functions**:

- **fuzzy**`(gadren)`

  (also finds "garden", note spelling error)

- **$**`go`

  (also finds words of the same origin, for example, "goes", "gone" etc)

You can form various combinations of this basic pattern and create complex search conditions, for example:

- `(today or tomorrow) and $go`

In this example, texts are found which contain "today" or "tomorrow" and a modification of "go" (for example, "gone"). In addition to the operators and functions presented here, there are several others. You can find an overview in Section 9.2.3.

9.2.2 Tips and Tricks

The general rules of the full-text search (see Section 9.1.1) also apply to complex search queries. This means that you can write consecutive words (separated by blank spaces) and exact phrases (in quotation marks) between the operators and you can use the wildcards `*` and `?`.

Additional notes:

- Round brackets `( )` serve to group expressions.

  Example: `(today or tomorrow) and Monday`

- Square brackets `[ ]` serve to group and cover all special characters.

  Example: `[today or tomorrow] and Monday`

- To search for a word that is coincidentally also an operator or a function, place it in double quotation marks.

  Example 1: `"and"`

  Example 2: `"$"`

- You can also enter complex search conditions in the fields of the extended search except in the field `exact phrase` (see Section 9.1.1.2). Simply enclose the conditions in round brackets.

  Example (all of the words): `(today or tomorrow) $go`

  (Finds all texts that contain one of the words "today" or "tomorrow" and a modification of "go".)

9.2.3 Operators and Functions

The following table contains the most important operators and functions:

Operator / Function	Example	Explanation
`and`	`Tree and garden`	Logical "and": Both expressions must occur in the text.
`or`	`Apple or pear`	Logical "or": Only one of the expressions must occur.
`not`	`Apple not pear` ("pear" must not occur)	Logical "not": The second expression must not occur.
`minus`	`Apple minus pear` (each occurrence of "pear" reduces the score)	Reduces the score of documents which contain the expression on the right. These documents appear lower down in the results list.

Operator / Function	Example	Explanation
`near`	`Tree near garden` `near((tree, garden),6)`	Two words in close proximity, default interval is 100 words
`fuzzy`	`fuzzy(gadren)` (finds "garden", note spelling error!)	Approximate search

`within`	`Tree within title`
	`Tree within abstract`
	`Tree within keyword`
		The search term must occur in a `title`, the `abstract` or the `keywords`.
		Only for Web articles (see Section 4.1.2)

`$`	`$go` (finds "goes", "gone", ...)	Words with same origin (only available for English, French, Spanish, Italian, German and Dutch)
`!`	`!smythe` (finds "smith")	Words that sound similar (English only)
`**`	`Apple or pear**5` (the occurrence of "pear" is rated five times higher)	To weight an expression or word. Relevant documents appear higher up in the results list.
`>`	`(Pear>30)` ("pear" must show a score of over 30)	To restrict the number of hits. The preceding expression must have a score[11] above the specified threshold value.

Table 33: Operators of the Full-Text Search

Note: You can find a more detailed description of all the commands in the documentation for Oracle Text which is the technological basis of full-text indexing (references in Appendix 10.6.2).

[11] The score is based primarily on the number of hits.

9.3 Global Search in the Portal

You are looking for information and do not know in which of the numerous categories or subsections of the portal it is concealed? The global search can help. There is always a search field in the page frame. After you enter a keyword, the text content of all portal pages is searched.

If the simple keyword search is not sufficient because, for example, you wish to search for forum posts or words in the title, then you can use the extended search (see figure below).

Note: Online forums and wikis provide additional local search options (see Section 5.1.1.4 or 5.3.1.5).

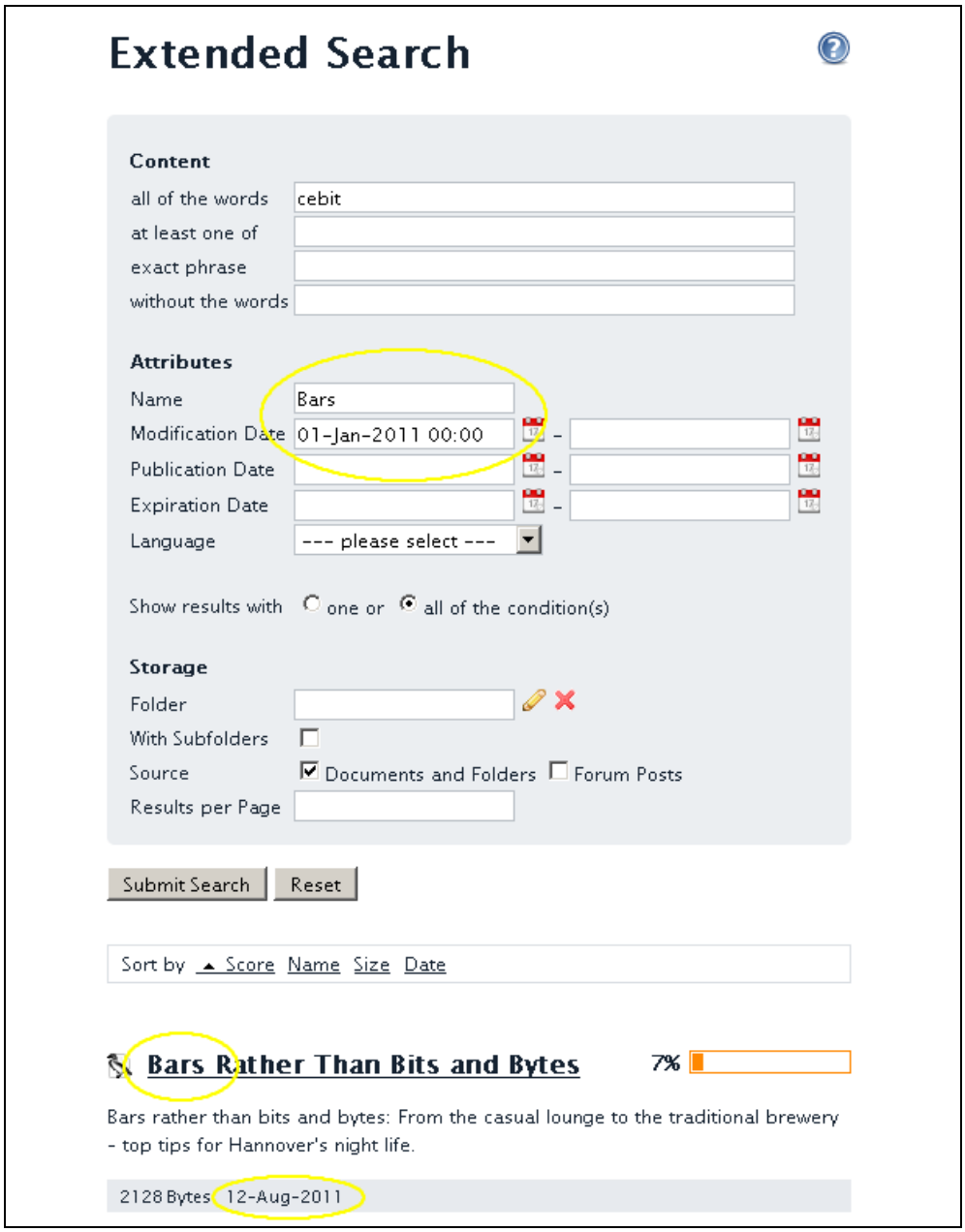


Figure 181: Extended Search in the Portal

9.3.1 Overview

You access the global search screen using the entry field in the page frame. Enter a keyword and press the Enter key or use the `Search` button.

On the results page the link `Extended Search` is available and this displays the extended search options (see Figure 177). Alternatively, you can go directly to the extended search by performing a standard search with an empty search field.

For each search result, the title and, where possible, a brief summary of the content is displayed (see figure above). To the right of the title a score is displayed, both as a percentage value and as a graphic. The score depends on the number of hits found using the full-text search.

Under the result, you can find other useful data such as the size of the article or when it was last updated.

You can sort the results by `Score`, `Name`, `Size` and `Date`. Use the sorting bar above the list for this.

9.3.2 Extended Search

The extended search options enable you to specify the search query in more detail. You can also use them to restrict the search to specific portal areas or to include forum posts, for example.

The entry fields are made up of three areas which are described below (see Figure 181).

9.3.2.1 Content

Different variants of the full-text search are available here:

- `all of the words`

  Each search term entered must occur in the text but not necessarily in the sequence specified.

- `at least one of`

  The text must contain at least one of the words entered.

- `exact phrase`

  The specified expression must occur in the text exactly as it is written. Caution: Special characters are interpreted exactly as written!

- `without the words`

  The text cannot contain any of the specified words. This function can only be used in conjunction with one of the search fields above.

You can use the wildcards `*` (any number of characters) and `?` (exactly one character). Experienced users can find more information in Section 9.1.1.

9.3.2.2 Attributes

These fields enable you to search specifically by page title (name), date and language:

- `Name`

  The search is restricted to the title. The search text must match a word or word group. You can use the wildcards `*` and `?`. For more information, see Section 9.1.2.

- `Modification Date`

  This is the date when the last change was made. You can enter a start date, an end date, or both. The symbol opens a small calendar.

- `Publication Date`

  When did the article become visible in the portal? Enter a start date or end date for the search. The symbol opens a small calendar.

- `Expiration Date`

  Some articles and areas are saved with an expiration date. The entry fields define the start and end dates for the search.

- `Language`

  Articles can be displayed in various languages – even if you are currently working with the English user interface. This field restricts the search to a single language, for example, to search for German texts only.

  Note: If the article you are searching for has not been approved for English users, it will not be found! In this case, you would have to switch to the appropriate language (utilities at the top of the page).

Caution: Did you make entries in more than one field? If you did, you should consider whether the text you are searching for is to fulfill all of the conditions or only one. Select the appropriate option.

9.3.2.3 Storage

Where is the search to take place? In the entire portal or only in a specific area?

- `Folder`

  This refers to the category or the subsection to be searched. If you click on the pencil, a pop-up opens with the page hierarchy. You can open subsections by clicking on the plus sign. Click on a name to select it.

- `With Subfolders`

  If you have selected a category (`Folder`), you can define here if subsections are also to be searched.

- `Source`

  The default setting is `Documents and Folders`. This means that all portal pages are searched. If you wish to include forum posts also, you must flag the check box.

  Note: This option is not available in every installation.

For more information on effective use of the entry fields, see Section 9.1.

9.4 Editorial Search

In the editorial view (see Section 2.4), there is a special editorial search which can find any contents in the Folders (see Chapter 3). This is – in contrast to the search in the portal – independent of whether the contents have been published and independent of their language.

Here also, however, you can only find those contents for which you have a read privilege (see Section 7.2.2).

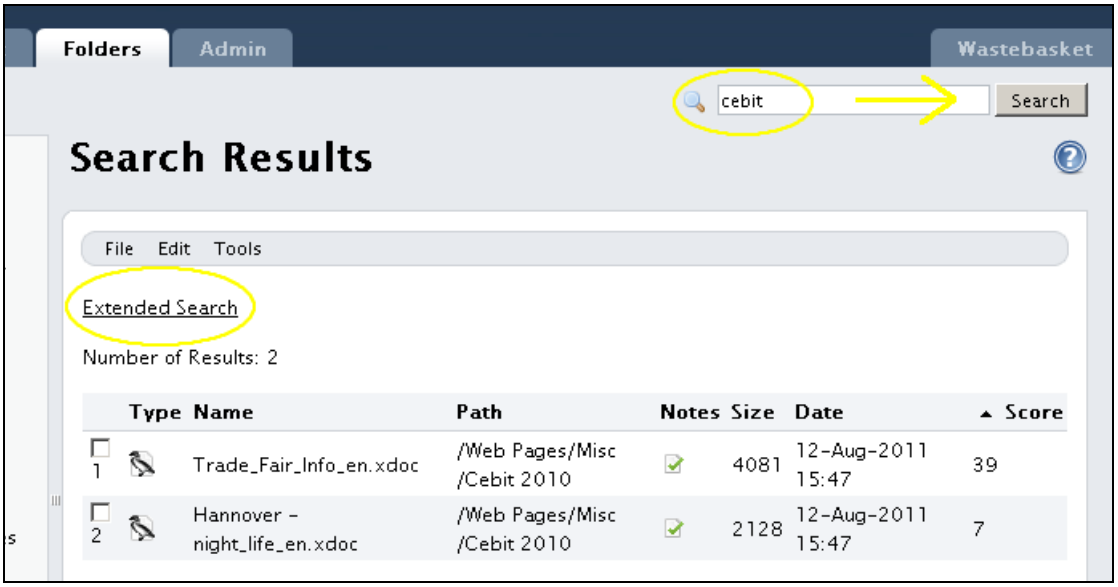


Figure 182: Editorial Search (Editorial View)

9.4.1 Overview

You access the editorial search similar to the global search in the portal (see Section 9.3) using the entry field in the page frame (see figure above). Enter a keyword and press the Enter key or use the `Search` button.

On the results page you can use the link `Extended Search` to display additional search options (see Figure 183). You can also go directly to the extended search by submitting an empty search field in the page frame.

The search results are listed in a table similar to the list view in the file manager (see Section 3.2). The file `path` and a `score` are also displayed. The score depends on the number of hits found using the full-text search.

By clicking on a column heading, you can sort the results.

9.4.2 Extended Search

The extended search options enable you to specify the search query in more detail. You can also use them to restrict the search to specific areas in the Folders (see Chapter 3) or to include forum posts.

The entry screen is made up of three areas which are described below.

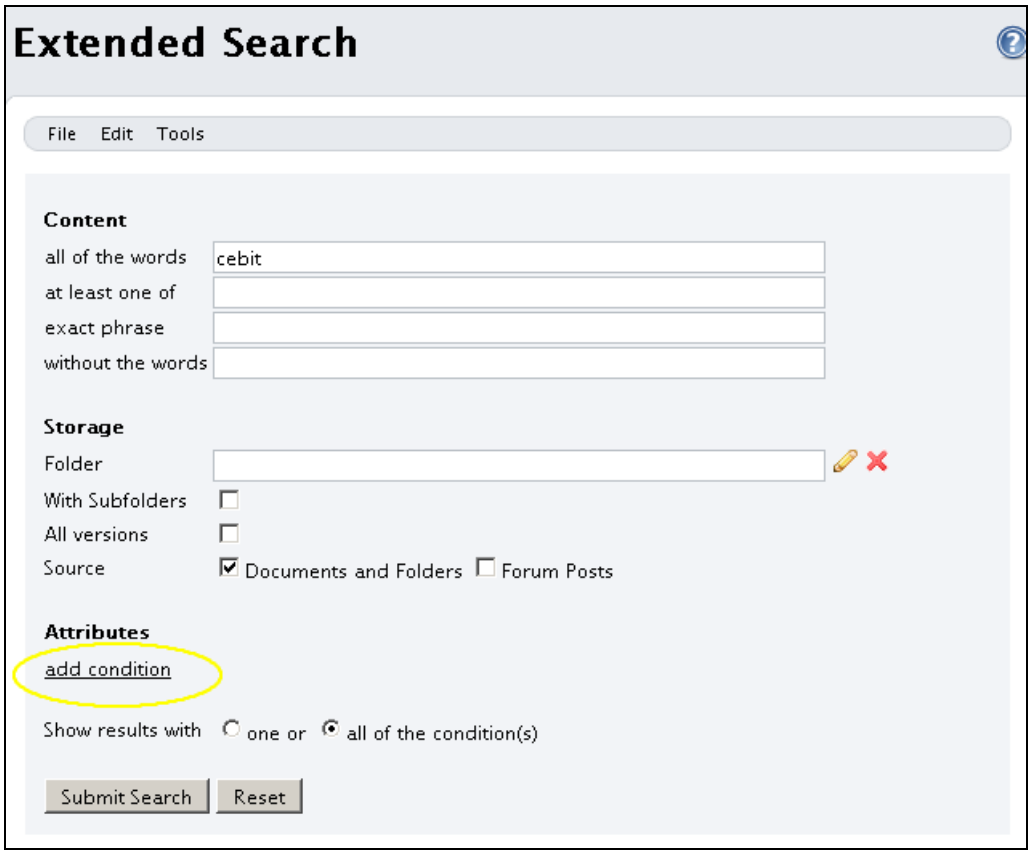


Figure 183: Extended Search Options (Editorial View)

9.4.2.1 Content

Different variants of the full-text search are available here:

- `all of the words`

  Each search term entered must occur in the text but not necessarily in the sequence specified.

- `at least one of`

  The text must contain at least one of the words entered.

- `exact phrase`

  The specified expression must occur in the text exactly as it is written. Caution: Special characters are interpreted exactly as written!

- `without the words`

  The text cannot contain any of the specified words. This function can only be used in conjunction with one of the search fields above.

You can use the wildcards `*` (any number of characters) and `?` (exactly one character). Experienced users can find more information in Section 9.1.1.

9.4.2.2 Storage

Where is the search to take place? Over the entire content repository (see Chapter 3) or only in a specific area? The search area can be extended to include forum posts or older versions of versioned documents.

The options:

- `Folder`

  This is the start folder for the search.

  By clicking on the pencil , you open a selection dialog with the folder hierarchy. You can open any subfolders by clicking on the plus sign. Click on a folder to select it.

- `With Subfolders`

  If you have selected a folder, you can specify here if subfolders are also to be searched.

- `All Versions`

  Do you wish to search for older versions of versioned documents (see Section 3.1.4)? If you do, flag the check box.

- `Source`

  The default setting is `Documents and Folders`. This means that all objects in the Folders are searched. If you wish to include forum posts also, you must flag the check box.

  Note: This option is not available in every installation.

9.4.2.3 Attributes

The Folders entries possess numerous properties and you can also search using these (see Section 3.3).

Click on the link `Add Condition` (see Figure 183), to insert a new condition. Then you can select one of the following attributes in the drop-down menu:

Attribute	Description
Name	Designation in the editorial view
Title (in multiple languages)	Designation in the portal view (one title for each language)
Description	Short description (see Section 3.3.6)
Keyword	List of keywords (see Section 3.3.6)
Expiration Date	End of the publication period (see Section 4.1.4)
Modification Date	Date of the last change
Publication Date	Start of the publication period (see Section 4.1.4)
Content Type	Type of the file, for example, "Microsoft Word" (documents only)
Character Set	Character set for text files (documents only)
Language	Language of the text content (documents only)
Owner	Owner of the entry, has full access privileges (see Section 7.1.3)
Work Group	Assigned work group (see Access Control)

Table 34: Search Attributes in the Editorial View.

In addition, the site-specific metadata can be selected (see Section 3.3.6).

After you have selected an attribute, a further drop-down menu appears with the search options (see figure below), followed by the entry field for the search value.

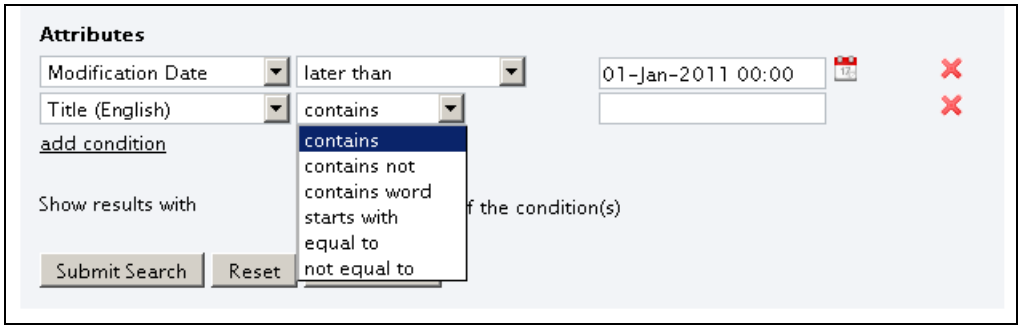


Figure 184: Search Options for a Text Attribute

For text attributes, you have the following options:

- `contains`

  The search term can appear anywhere in the text. You can use the wildcards `*` and `?`.

- `contains not`

  The search term must not occur. You can use the wildcards `*` and `?`.

- `contains word`

  One or more words in the attribute must match the search term. You can use the wildcards `*` and `?`.

  Note: If you do not know the exact word ending, append an asterisk `*`, for example, `auto*`.

- `starts with`

  The value of the attribute must begin with the search term. You can use the wildcards `*` and `?`.

- `equal to`

  The search term must be exactly equal to the value of the attribute. Wildcards are not permitted.

- `not equal to`

  The search term must not be equal to the value of the attribute. Wildcards are not permitted.

Note: There are some search values which you cannot enter directly, for example, a user. In this case, use the pencil to open a selection dialog.

Caution: Did you enter multiple search conditions? If you did, you should consider whether the entry you are searching for is to fulfill all of the conditions or only one. Select an appropriate option.

For more information on the effective use of the search screen, see Sections 9.1 and 9.2.

9.4.2.4 Save Query

Occasionally, you may have to carry out a complex search query several times. Rather than filling out all search fields every time, you can save your search settings. To do this, choose the button `Save Query`: You are requested to enter a name for the search.

Note: The button only becomes visible after you have submitted the search (hidden behind the drop-down menu in Figure 184).

Note: Only search parameters are saved, no results.

Saved queries are stored as special objects (see Section 3.1.3) in your private folders (see Section 3.1.1).

To call up a stored query, open the editorial view, switch to `Home` using the main navigation menu and choose `My Queries`.

The folder with your stored queries opens. Open the relevant search by clicking on the name.

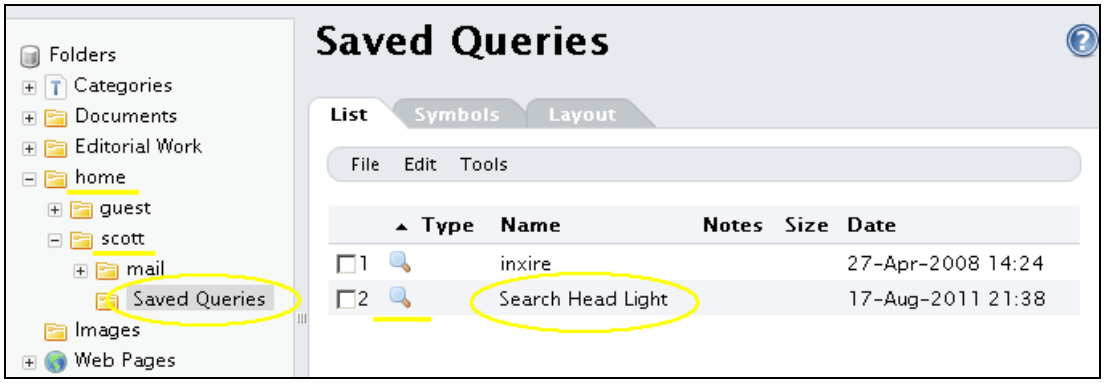


Figure 185: Stored Query in Private Folders of User scott

9.4.3 Editing Functions

In the editorial search, there are numerous editing functions available, similar to the file manager (see Section 3.2.4). You can flag one or more of the search results with a check mark and then choose a function from the menu bar (see Section 2.4.2.1). Alternatively, you can use the context menu (see Section 2.4.2.2).

In the extended search, the menu bar is above the entry fields (see Figure 183).

For a complete description of all menu options, see Appendix 10.3.

9.5 Search in Selection Dialogs

A recurring element in the application is the selection dialog with search function. The following section provides general information on its effective use.

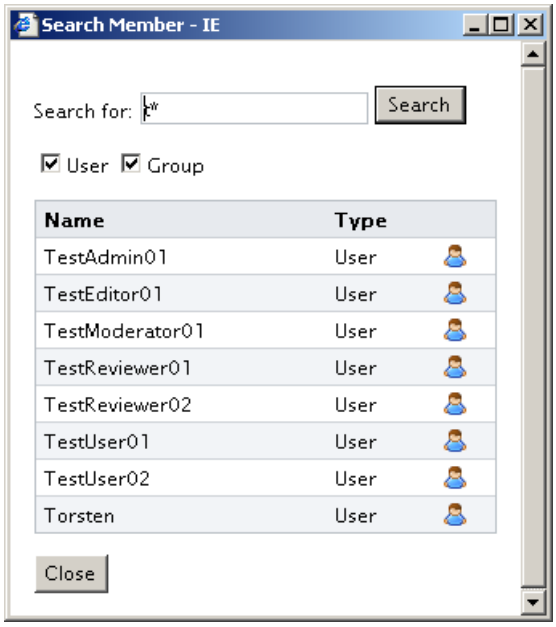


Figure 186: Search for Users and Groups

The figure displays a typical selection dialog (here for group members, see Section 6.4.2). At the top you can see the search field and below it, the current results list.

Initially, the results list is empty. You must first enter a search text and then choose the Enter key or the `Search` button. The results list is updated. If the appropriate entry has been found, you select it by clicking on the name.

The search in selection dialogs is usually a simple attribute search, that is, you search for the **initial part of the text** and can use the wildcards `*` and `?`. For further tips, see Section 9.1.3.

Exception: When searching for forum posts, processes (working title) or wiki articles, you search for a **word** in the title. Here also, you can use the wildcards `*` and `?`. For tips on the word search, see Section 9.1.2.

10 Appendix

10.1 List of Icons

In lists and directories, the following icons are used.

Icon	Document type	Description
		Unknown object (only visible in exceptional cases)
		Registered users
		Work group or ordinary group[12]
		Role within a work group (see Chapter 6)
		Folder
		Topic / category (see Section 5.7)
		A synonym for a topic (a note object, see Section 5.7.1.2)
		Website (start folder of the portal, see Section 3.1.1)
		Online forum or post (see Section 5.1)
		Wiki (see Section 5.3)
		Document share (see Section 5.4)
		Task or task list (see Section 5.5)
		News channel (a note object attached to a folder or online forum, see Section 5.6)

[12] This is not a work group but rather an ordinary user group (see Section 6.1.4).

Icon	Document type	Description
		Stored Query
		Online survey (see Section 5.2)
		Published in the portal (additional note, see Section 4.1.4)
		Versioned document (additional note, see Section 3.1.4)
		Wastebasket entry (a note object, see Section 3.5.18)
		Indicator of pending update (a note object, see Section 3.2.5)
		Indicates the working copy of a pending update (a note object, see Section 3.2.5)
		Process in the context of workflow management (see Chapter 8)
		Editorial folder (a note object, no longer used in inxire ECM 5.1)
		Protected document or folder (note object used during a process, see Chapter 8)
	General document	Document with unknown format
	General binary format	Unknown binary format
	Text	Flat text file
	Image	Image file, for example, GIF, JPEG, PNG, etc.
	Audio	Audio file, for example, MPEG Layer 3 Audio (mp3)

Icon	Document type	Description
	Video	Video file, for example, QuickTime, Real Video, AVI or Flash
	Archive	Archive file, for example, in ZIP format
	Microsoft Word	Word document
	Microsoft Excel	Excel table
	Microsoft PowerPoint	PowerPoint presentation
	PDF	PDF document
	RDF	File with metadata in accordance with RDF standard (Resource Description Framework, see Appendix 10.2)
	DocBook	Web article in DocBook format (see Section 4.1.2)
	HTML	HTML document
	XML	Document in XML format (Extended Markup Language)

10.2 List of Supported RDF Attributes

If you download a document or folder as a ZIP archive with inxire ECM (see Section 3.5.12), an RDF file is generated automatically and stored under `/META-INF/meta.rdf` in the archive.

This RDF file contains important attributes such as owner and access control settings for all documents and folders in the archive. If you later upload the ZIP archive to inxire ECM (see Section 3.5.13), the attributes are read automatically from the RDF file and reassigned to the uploaded documents and folders.

RDF (Resource Description Framework) is a W3C standard for the exchange of metadata between Content Management systems (references in Appendix 10.6.4). Manual processing of the RDF file by the end user is not intended.

The following table describes the supported attributes (see Section 3.3.3 to 3.3.6).

Attribute (inxire ECM)	RDF Attribute	Description
Title (in multiple languages)	dc:title	Designation in the portal in all available user languages, per default, English and German
Description	dc:description	Description of the document or folder
Publication Date	dc:date	Date/time of publication in the portal (see Section 4.1.4)
Content Type	dc:format	File type and optional character set in accordance with MIME standard (only for documents), for example, `text/plain; charset=utf-8`
Language	dc:language	ISO-639-language code, for example, `de`
Priority	ioc:sortPriority	Controls the display sequence in the portal. Entries with a priority appear first, smaller values before greater.
Work Group	ioc:workGroup	Name of the assigned work group, for example, `inxire`

Attribute (inxire ECM)	RDF Attribute	Description
Access Control List	ioc:acl	Internal designation of the assigned standard ACL (see Section 7.3). Extended privileges are not saved.

Table 35: RDF Attributes in inxire ECM

10.3 Menus in the Editorial View

On many screens in the editorial view, there is a menu bar above the lists and directories which contains important editing functions (see Section 2.4.2.1).

These menus are described below in detail.

Note: Many of the functions can also be called using the context menu (see Section 2.4.2.2).

10.3.1 General Notes

The figures show the menus as they appear to a regular user. Special actions, which are restricted to the system administrator, are not shown but are described in the tables.

All menu options shown in gray are inactive, that is, they cannot be executed. Some functions require you to first select one or more entries from the list. Other functions require special privileges, for example, write privileges in the current folder (see Chapter 7).

To select an entry, click on the check box. If you wish to select all entries, it is best to use the function `Select All` in the context menu above the check box (right mouse key under Windows, see Figure 6). You can recognize flagged entries by the check mark.

10.3.2 File Menu

The File menu contains important file operations such as create, delete and copy. You can apply these menu functions to documents and folders and also to the special objects in the Folders (see Section 3.1.3).

This menu is available on many screens in the editorial view, especially where documents and folders are listed in table form. Examples include the file manager (see Section 3.2) or the results page of the editorial search (see Section 9.4).

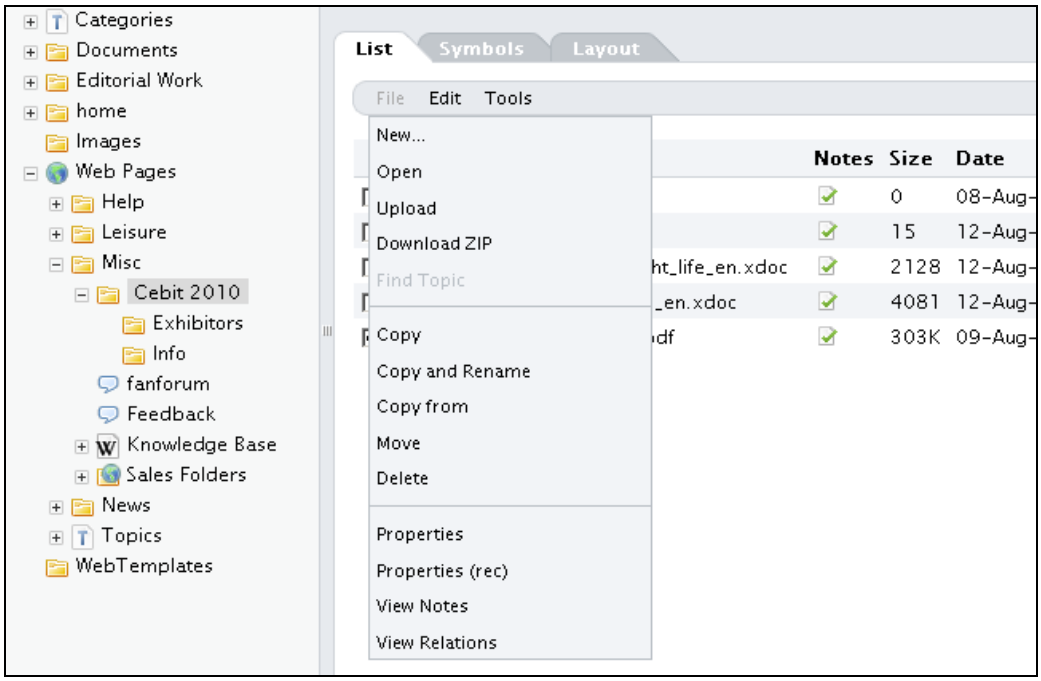


Figure 187: File Menu in the Editorial View

Below, we describe each group of menu functions.

Function	Description
Create and Save	
New...	This function creates a new entry in the current directory. It is only active in the file manager (see Section 3.2). When you call the function, a dialog opens where you select the type: Folder, article or survey, etc. (see Section 3.5.1).
Open	Web articles and surveys are opened for editing, documents are offered for download, and folders are listed in the file manager (see Section 3.2). You must select exactly one entry. This function is equivalent to clicking on the name.
Upload	The dialog for uploading documents is opened. This function is only active in the file manager (see Section 3.5.2).
Download ZIP	The flagged documents and folders are offered for download as a ZIP archive (see Section 3.5.12). You can select one or more entries.

Function	Description
Find Topic	The function `Find Topic` opens a pop-up where you can find existing topics (categories) and insert them into the current directory (see Section 5.7.3.2). This function is only active within a topic tree (see Section 5.7). Note: Alternatively, you can create a new topic using the function `New…` (see Section 5.7.3.1).
Copy and Delete	
Copy	The function `Copy` creates a copy of the flagged entries and saves them in a separate directory. When you call the function, a pop-up opens where you select the target folder (see Section 3.5.7). You can select one or more entries. Folders are copied with all contents including subfolders.
Copy and Rename	The flagged entry is renamed and saved as a copy in the same directory. This function is only active in the file manager (see Section 3.5.9). You must select exactly one entry.
Copy From	Any entry from the Folders is copied to the current directory. A pop-up appears where you can select the **Source**. This function is only active in the file manager (see Section 3.2).
Move	This function moves the flagged entries to a different directory. When you call the function, a pop-up opens where you select the target folder (see Section 3.5.7). You can select any number of entries.

Function	Description
Hard Link (not in the figure)	The flagged entries are assigned to a second directory. A pop-up appears where you can select the destination (see Section 3.5.20). Then the entries are maintained **equally** in both directories. This can cause some confusion, especially for occasional users. You should only use this facility in exceptional and justified cases. This function is only available to system administrators.
Delete	The "Delete" function moves the flagged entries to the wastebasket. You can select any number of entries.
Properties and Relations	
Properties	The flagged entries are opened in the properties dialog (see Section 3.3). If you have write privileges for the entries, you can make changes. You can select one or more entries. If you select more than one entry, only the properties shared by all are displayed.
Properties (rec)	The flagged entries are opened in the properties dialog (see Section 3.3) and the option `Recursive Update` is activated automatically. If you have write privileges for the entries, you can make changes. This function is especially useful for folders in order to make changes effective for all the documents, subfolders and other contents contained in it. You can select one or more entries.
View Notes	The notes for the flagged entry are listed in detail (see Section 3.5.18). You must select exactly one entry.

Function	Description
View Relations	All relations from and to the flagged entry are listed (see Section 3.5.19). In most cases, relations are links of a Web article (see Section 4.1.2) to other contents or embedded images. You must select exactly one entry.

Table 36: Functions in the File Menu

10.3.2.1 File Menu in the Wastebasket

The File menu in the wastebasket provides some special functions.

Function	Description
Restore	This function restores the flagged wastebasket entries to their original storage location (see Section 3.5.10). You can select one or more entries.
Restore to ...	The flagged entries are restored to any directory in the folders. When you call the function, a pop-up opens where you select the destination. You can select one or more entries.
Erase Finally	When you call this function, the flagged entries are deleted **permanently** from the system (see Section 3.5.11). They cannot be restored. You can select one or more entries. Note: Exercise great care with this function – or wait until the wastebasket is emptied automatically, usually after 30 days.

Table 37: File Menu in the Wastebasket

10.3.3 Edit Menu

The functions for working with temporary process data (see Section 3.2.5), versioned documents (see Section 3.1.4), Web articles (see Section 4.1.2) and surveys (see Section 5.2) are combined in the Edit menu. Here you can call the article editor or the survey editor. You can reserve and release versioned documents and process data.

Are some of these terms unfamiliar? You can find an introduction in the description of the Folders in Chapter 3.

The Edit menu is displayed on many of the screens in the editorial view. Examples include the file manager (see Section 3.2) or the results page of the editorial search (see Section 9.4).

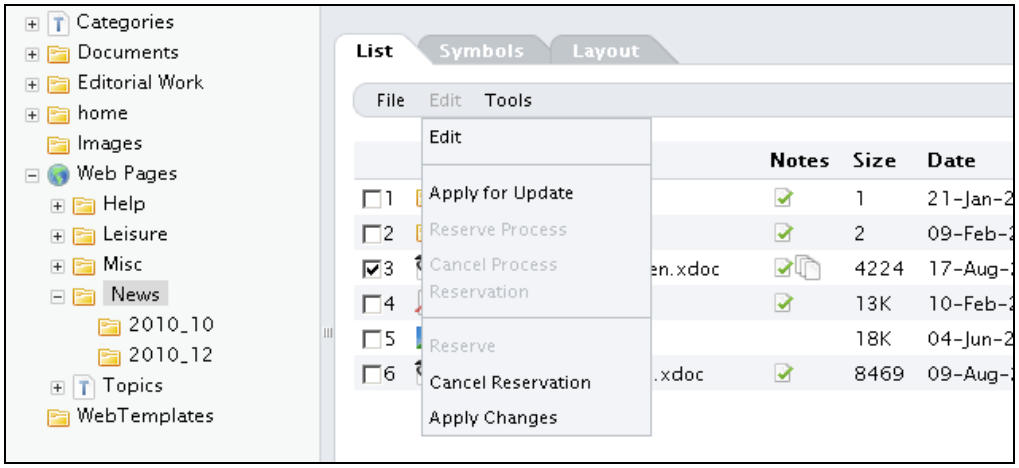


Figure 188: Edit Menu in the Editorial View.

Below, we describe each group of menu functions.

Function	Description
Edit in the Editor	
Edit	This function opens the flagged entry for editing of its content. The article editor (see Section 4.3) opens for Web articles and the survey editor (see Section 5.2.2) opens for surveys. You must select exactly one entry. Note: The relevant editor also opens if you click on the name of the article or survey.
Processes (The following functions are not available in every installation.)	
Apply for Update	In the current folder, a publication process (see Section 8.5) is started. You can select entries before calling the function. These are reserved automatically. This function is only active in the file manager and is only active for contents of the portal. You can find detailed instructions in Section 8.7.2.

Function	Description
Reserve Process	The current process (which is displayed on the top right) is reserved exclusively for you. This function is only active in the work folder of a process (see Section 3.2.5). The process must not already be reserved.
Cancel Process Reservation	The reservation of the current process (which is displayed on the top right) is canceled. This function is only active in the work folder of a reserved process (see Section 3.2.5). You must either have reserved the process yourself or be an administrator.
Reserve Note: In the work folder of a process (revision mode, see Section 3.2.5) or when working with versioned documents (see Section 3.1.4), you must reserve the contents before editing.	
Reserve	This reserves the flagged entries for you. A working copy is created and appended to the original. You can select one or more entries. Note: Following reservation, the entries are locked for other users.
Cancel Reservation	Reservation of the flagged entries is canceled. You can select one or more entries. Note: Only a system administrator can cancel the reservations of other users.
Apply Changes	This function completes editing of the flagged entries, this means that the working copies now become the new originals. You are requested to enter a version comment (see Section 3.5.5). This function is only available for versioned documents (see Section 3.1.4). You must either have reserved these yourself or be a system administrator. You can select one or more entries.
Version History	

Function	Description
Remove Version (not in the figure)	The flagged version is removed. This function is only active in the version history of a versioned document (see Section 3.5.6). It is only available to the system administrator. You must flag exactly one version.

Table 38: Functions in the Edit Menu

10.3.4 Tools Menu

The Tools menu contains many useful functions from different areas, for example, the functions for evaluating surveys (see Section 5.2.3) and for comparing Web articles (see Section 4.7.6).

The Tools menu is displayed on many of the screens in the editorial view.

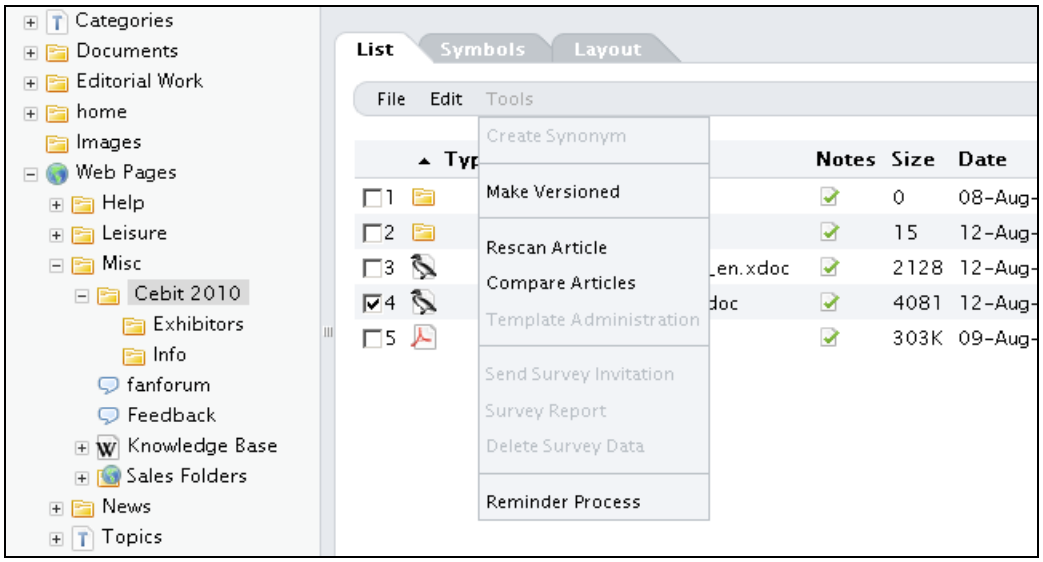


Figure 189: Tools Menu in the Editorial View.

Below, we describe each group of menu functions.

Function	Description
New...	
Create News Channel (not in the figure)	This function appends a news channel to the flagged entry. It is only available to the system administrator. You must select exactly one entry. The properties dialog opens for configuration of the channel (see Section 5.6.3).

Function	Description
Create Synonym	A new synonym is defined for the flagged topic (category) (see Section 5.7.3.3). You must be in a topic tree (see Section 5.7) and flag exactly one topic. Then the properties dialog (see Section 3.3) opens where you can enter the name, title and publication period of the synonym.
Version and Lock	
Make Versioned	This function converts the flagged documents into versioned documents (see Section 3.5.4). You can flag one or more documents.
Release Locks (not in the figure)	A dialog opens with which you can remove locks (see Section 3.5.22). You must select exactly one entry. If you select a folder, then you can also release the locks for the documents and subfolders contained in it. This function is only available to system administrators.
Articles and Templates	
Rescan Article	This function analyzes the flagged Web articles (see Section 4.1.2) and saves information on links (see Section 4.7.8). You can select as many entries as you wish but you are restricted to Web articles and folders. The folders and all their subfolders are searched recursively for Web articles.
Compare Articles	The flagged article is compared with another article in the Folders. A pop-up appears where you can select the second article. Then the article comparison opens (see Section 4.5). You can find detailed instructions in Section 4.7.6. Note: This function is not available in every installation.

Function	Description
Template Administration	The template editor opens (see Section 4.2). You must be in the templates folder (see Section 3.1.1) and flag exactly one article template.
Surveys Note: Surveys are not available in every installation. For an introduction, see Section 5.2.	
Send Survey Invitation	This function sends an invitation e-mail for the flagged survey (see Section 5.2.2.2). You must flag exactly one survey. When you call the function, a pop-up opens where you select the invitation mail. Select a Web article (see Section 4.1.2).
Survey Report	A statistical evaluation of the flagged survey is displayed (see Section 5.2.3). You must flag exactly one survey.
Delete Survey Data	This function deletes all recorded data of the flagged survey and all information on the invited participants (see Section 5.2). You must flag exactly one survey. Caution: The data cannot be restored!
Other ...	
Reminder Process	This function starts a reminder process (see Section 8.6). This sends you a reminder e-mail at a predefined time. You are requested to enter the time and message text (see Section 8.7.4).

Table 39: Functions in the Tools Menu

10.3.5 Group Admin Menu

The `Group Admin` menu combines all the functions of group administration. You can create, delete, and reorganize work groups and also administer members and roles.

This menu is only available in the group administration area (see Chapter 6).

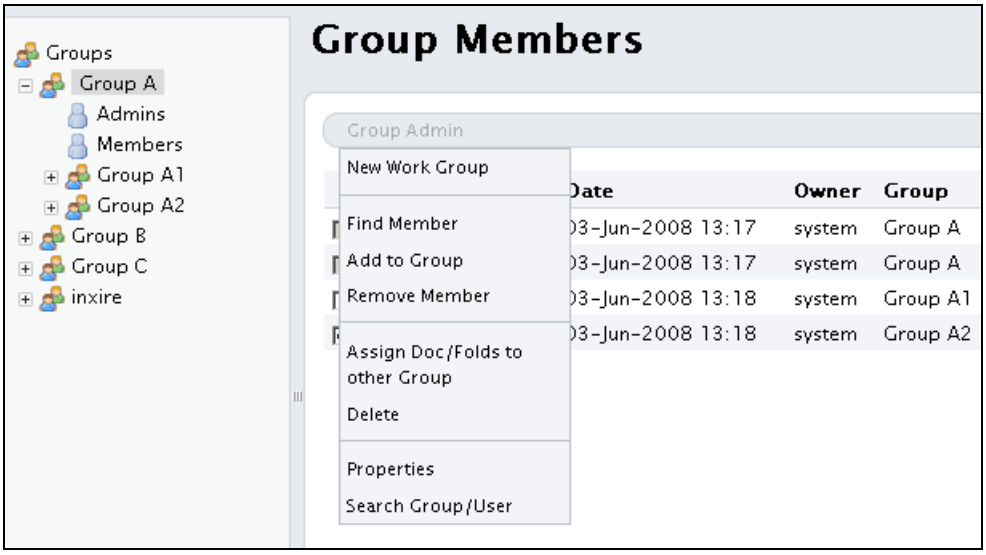


Figure 190: "Group Admin" Menu

Below, we describe each group of menu functions.

Note: Only a system administrator or work group administrator can make changes here.

Function	Description
New...	
New Work Group	The function `New Work Group` creates a new work group. This is entered in the list as a subgroup. You must navigate to a work group to use this function.
Member Administration	

Function	Description
Find Member	A pop-up opens where you can search for a new member. Depending on your current position, appropriate search options are provided: • In a work group, you can insert another work group or a role. • In a role, you can enter a user or an ordinary group[13]. For detailed instructions, see Section 6.4.2.
Add to Group	The function `Add to Group` enters the flagged members into an additional work group or role. A pop-up opens where you can select the destination (see Section 6.4.5). You can flag any number of entries.
Remove Member	The flagged entries are removed from the member list; however, they remain in the system. You can flag any number of entries. Note: Roles cannot be removed from a work group. Instead, you navigate to the role and remove all entered users.
Delete Note: In the inxire ECM Web interface, you can only delete work groups. Users and ordinary groups are administered by the system administrator using external tools (see "Administration Manual inxire ECM"). Note: Roles cannot be removed from work groups. Instead, you navigate to the role and remove all members.	
Assign Doc/Folds to Other Group	This function assigns all documents, folders, and other objects, which are assigned to the flagged work group, to another group. A pop-up opens where you can select the replacement group (section 6.4.9). You must flag exactly one work group. Note: A work group can only be deleted if no contents are assigned to it.

[13] This is not a work group but rather an ordinary user group (see Section 6.1.4).

Function	Description
Delete	The flagged work group is removed permanently from the system. You must flag exactly one work group. For detailed instructions, see Section 6.4.9.
Properties Note: In addition to other properties, the group and role assignments of a user are displayed here. In the case of work groups, the position in the group hierarchy is shown (see Section 6.4.10).	
Properties	The properties of the flagged entry are displayed. You must flag exactly one list entry. This can be a user, a work group or an ordinary group[14].
Search Group/User	This function enables you to search for users and groups and to display their properties. A search window opens. There you can search for users, ordinary groups[14] and work groups. A click on a name opens the properties dialog (see Section 6.4.10).

Table 40: Functions in the "Group Admin" Menu

[14] These are not work groups but rather ordinary user groups (see Section 6.1.4).

10.4 Sample Metadata

Metadata consists of functional attributes which simplify administration and research in large datasets (see Section 9.4.2.3). The metadata is maintained in the properties dialog on the `Metadata` screen (see Section 3.3.6).

In addition to the standard attributes `Description` and `Keywords`, you can define any number of other meta-attributes. These are usually defined by qualified persons when the system is being set up.

Here, the sample configuration of inxire ECM is shown as an example. The meta-attributes are combined in topical groups (here: `General`, author, etc.) to provide orientation for the user.

Caution: The actual configuration will most likely differ significantly from this!

Note: A system administrator can view the current configuration in the editorial view under `Admin > Metadata Administration`. Minor changes can also be made here (see Section 3.5.21).

Group	Attribute	Available with	Description
General	Serial Number	Web articles, folders, work groups and roles	Example of a numerical attribute
	Person in Charge	Web articles, folders	Reference to a user (mandatory field)
	Dept in Charge	Web articles, folders	Reference to a work group (mandatory field)
	Known Persons	Users	Reference to multiple users
	Known Groups	Users	Reference to multiple work groups
	Main Keyword	Documents	Selection from keyword list (mandatory field)
	Keywords	Documents, folders	Multiple selection from the keyword list
	Category	Documents, folders	Selection from the topic tree `/Categories` (the name can vary, see Section 3.1.1)

Group	Attribute	Available with	Description
	Themes	Documents, folders	Multiple selection from the topic tree `/Categories`
	Comments	Documents, folders	Free text field (multiple lines)
Author	Salutation	Documents, Web articles	Selection list for form of address
	Name	Documents, Web articles	Free text field
	Street	Documents, Web articles	Free text field
	ZIP	Documents, Web articles	Free text field
	City	Documents, Web articles	Free text field
	Country	Documents, Web articles	Free text field
	Image	Documents, Web articles	Reference to a document (image file) in the Folders
Technical Information	Original Content Type	Documents, Web articles	Selection from list of document formats
	Wished Document Type	Documents, Web articles	Multiple selection from list of document formats
	Old IDs	Documents, Web articles	Entry field for multiple integers (separated by comma)
	Weight	Users	Entry field for a floating-point number

Group	Attribute	Available with	Description
	Old Weights	Users	Entry field for multiple floating-point numbers (separated by comma)
Lifecycle	Import Dates	Documents, Web articles, folders, users, work groups and roles	Example of a date field with multiple entry (write-protected[15])
	Import Folders	Documents, Web articles, and folders	Reference to multiple folders in the content repository (write-protected[15])
	Archive Date	Documents, Web articles, folders, users, work groups and roles	Example of a simple date field (write-protected[15])
	Archived	Documents, Web articles, folders, users, work groups and roles	Example of a check box (write-protected[15])

Table 41: Sample Metadata of inxire ECM

[15] Write-protected metadata can only be changed by a system process or by the system administrator

10.5 Glossary

10.5.1 ACL

Abbreviation for "Access Control List".

The ACL, together with the work group (see Section 6.1.1), regulates access to the documents, folders and special objects (see Section 3.1.3) in the content repository.

See Chapter 7 "Access Control".

10.5.2 Article Editor

The article editor enables you to edit Web articles (see Section 4.1.2). You call it from the editorial view (see Section 2.4) using menu option `File > Open`.

See Section 4.3.

10.5.3 Article Template

An article template is the template for a Web article (see Section 4.1.2). This defines which template elements (title, subtitle, title image etc.) can, or even must, be used in the article. The template may already contain some content.

See Section 4.2.

10.5.4 Content Repository

See "Folders".

10.5.5 Directory

See "Folder".

10.5.6 DocBook

DocBook is a universal, media-independent document format from the Organization for the Advancement of Structured Information Standards (OASIS). All text content in the portal is saved in DocBook format (as a Web article, see Section 4.1.2).

References in Appendix 10.6.3.

10.5.7 Document

In inxire ECM, a document refers to any type of file that is stored in the system. Examples include Web articles, PDF documents or images.

See Section 3.1.

10.5.8 Editorial View

An independent application is available for the revision of portal pages and for administrative activities: the editorial view. Only logged in and authorized users have access.

See Section 2.4.

10.5.9 Folder

Folders help to structure the content repository. A folder can contain documents and subfolders. In the portal, folders appear as navigation nodes (see Section 4.1.3).

The terms folder and directory are used synonymously in inxire ECM.

See Chapter 3 "The Folders".

10.5.10 Folders

The Folders are inxire ECM's content repository with all saved information. The structure resembles a classic file system with files and folders. Files – called documents here – can exist in numerous formats, for example, as PDF documents or JPEG images.

In addition to documents and folders, the content repository also contains special objects such as online forums and wikis.

See Chapter 3 "The Folders".

10.5.11 Forum

A forum (also online forum) is a platform for online discussions. Forums can be located anywhere within the portal. Here you can read posts, enter your own, or with sufficient privileges, you can also moderate.

See Section 5.1.

Note: This functionality is not available in every installation.

10.5.12 Metadata

Metadata consists of functional attributes that are linked with documents or folders. By maintaining the metadata (see Section 3.3.6), you improve the search (see Section 9.4) in large datasets.

10.5.13 News Channel

Users can subscribe to news channels. A news channel covers a specific area of the portal, for example, the news area or a forum. The subscribers are informed regularly by e-mail about new or changed articles.

See Section 5.6.

10.5.14 Oracle Text

Oracle Text forms the technological basis of the content search in inxire ECM. It supports all common Office formats and provides a complex query language (see Section 9.2).

For references, see Section 10.6.2.

10.5.15 Role

A role is a term from group administration (see Chapter 6). A user can have one or more roles within a work group (see Section 6.1.1), for example, as an ordinary member, an administrator or an editor.

Do not mistake the work group role for the roles in the forum (see Section 5.1.1.1), wiki (see Section 5.3.1.1), document share (see Section 5.4.1.1) or task list (see Section 5.5.1.1).

See Section 6.1.2.

10.5.16 Topic Tree

In a topic tree, the terms (called topics or categories) are arranged hierarchically. In the portal, you can navigate using the topics and you can display relevant articles (see Section 5.7.1). It is sometimes possible to subscribe to individual topics (see Section 5.6.1.2).

In the editorial view, topic trees serve to categorize documents and folders as part of metadata maintenance (see Section 3.3.6). In the topic search (see Section 3.2.3.2) you can view the assigned documents.

See Section 5.7.

10.5.17 Wiki

A wiki organizes articles according to headwords, similar to a dictionary. In the portal, multiple wikis can be created for different topical areas. If you have sufficient privileges, you can create and edit wiki articles directly in the portal.

See Section 5.3.

Note: This functionality is not available in every installation.

10.5.18 Work Group

Work groups combine multiple users in a logical unit and thus simplify the allocation of access privileges (see Chapter 7). The work groups usually roughly map the hierarchical structure of the company. In addition, project teams and task forces are frequently created as work groups.

Within the work group, one or more roles are assigned to the users, for example, as a member, administrator or editor.

See Chapter 6 "Group Administration".

10.5.19 WYSIWYG Editor

The WYSIWYG editor enables you to edit Web Articles interactively (see Section 4.1.2). It is opened within the article editor (see Section 4.3) for individual text sections. The WYSIWYG editor works in the same way as familiar common text processing programs.

WYSIWYG stands for "What You See Is What You Get"; the article is edited and displayed as it will appear when published.

See Section 4.4.

10.6 References

10.6.1 inxire ECM

[1] User Manual inxire ECM, Version 5.1

[2] Installation Guide inxire ECM, Version 5.1

[3] Administration Manual inxire ECM, Version 5.1

10.6.2 Oracle Text

[4] www.oracle.com/technetwork/database/enterprise-edition/index-098492.html

Technical product description, description of the functions and numerous suggestions (link changes frequently, if necessary, check www.oracle.com)

[5] www.oracle.com/pls/db112/portal.portal_db?selected=7

Official documentation of Oracle Text, Oracle Ultra Search and other search functions for developers and users (part of Oracle 11gR2 database documentation)

10.6.3 DocBook

[6] tldp.org/HOWTO/DocBook-Demystification-HOWTO

"DocBook Demystification HOWTO", excellent introduction to working with DocBook (Eric Raymond, 2002).

[7] www.docbook.org/tdg/en/html/docbook.html

"DocBook: The Definitive Guide", official documentation of the DocBook standard (also available in hard copy, Norman Walsh and Leonard Muellner, O'Reilly 1999)

[8] www.opendocs.net/docbook/simplified-docbook-definitive-guide

"Simplified DocBook: The Definitive Guide", official documentation of Simplified-DocBook (Norman Walsh and Leonard Muellner, O'Reilly, 2002)

[9] www.docbook.org

Information page on the DocBook Standard (O'Reilly)

[10] www.oasis-open.org/docbook

Official home page of the DocBook Standard (OASIS)

[11] www.nwalsh.com/docbook

Overview page with important references by one of the founders of the DocBook Standard (Norman Walsh)

[12] people.freebsd.org/~nik/sgmlxml.gif

"DocBook SGML and XML Processing Path", graphical illustration of the processing chain (Nik Clayton, 2001)

[13] docbook.sourceforge.net

"DocBook Open Repository", developer home page for various tools, especially XSLT style sheets; numerous links to other sources (SourceForge).

10.6.4 RDF

[14] www.w3.org/RDF

Here you can find the official specification for the "Resource Description Framework" (RDF) and numerous links to projects and tools.